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ABSTRACT

The handbook is a compilation of ideas which evolved during the pilot year of the Northwest Area Foundation Grant Project, Rural Based Teacher Education Program. The first section addresses: the types of roles linking agents can serve; who can serve as a linking agent; who will be the client; the steps recommended for a linking agent-client relationship; the meaning of the intervention process; the coordinator's role; ways in which a linking agent may intervene; strategies a linking agent can utilize to facilitate a client's training program; and some helpful ideas for a linker and a client in building their communication process. In addition, the section addresses how a problem should be approached by a linker and by a client, i.e., scouting (problem identification and definition); entry (getting into the process); formulating a contract (enrolling in appropriate college courses); establishing a helping relationship; goal setting and planning; action and cycling (feedback); and termination (follow-up and evaluation). The appendices, which comprise over half of the handbook, are made up of: 12 forms; a learning style inventory; a partial inventory of decisions in each phase of consultation; a questionnaire providing self- and peer-rating of some areas of competency for the educational training consultant; problem solving worksheets; and feedback. (AH)

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LINKING AGENT - CLIENT

PROGRAM DEVELOPMENT

HANDBOOK

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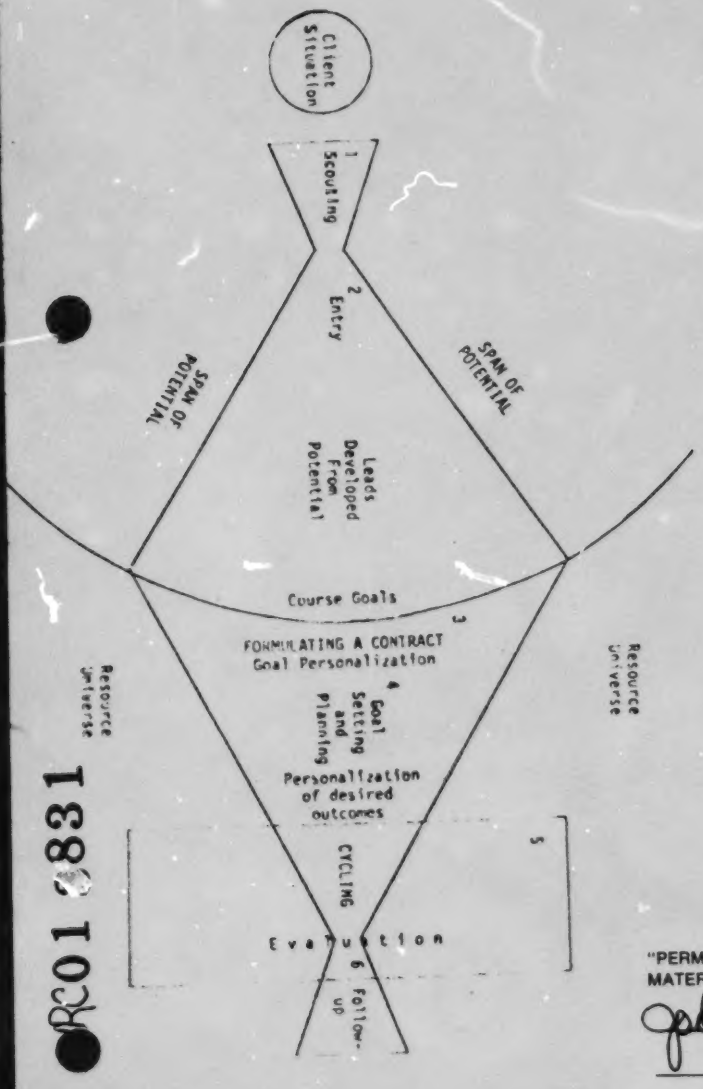

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NORTHWEST AREA FOUNDATION GRANT

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This handbook is a compilation of ideas which evolved during the pilot year of the Northwest Area Foundation Grant Project, Rural Based Teacher Education Program. The support and encouragement of the Project Director, Dr. Harvey Bennett, has been a motivating force in the development of the process described in this handbook. Project Coordinator, Dr. Ted Williams, provided invaluable support through research and critique. The input from Grant Project Linkers and Clients is incorporated into the process.

Dr. Rene' Pino, consultant at the Northwest Regional Laboratory in Portland, was generous in sharing his expertise and the Laboratory resources during the developmental stages of the handbook. Carrie Burnside was tireless in typing the manuscript and drawing the illustrations.

Last, but not least, I want to express gratitude to the Northwest Area Foundation for funding this type of opportunity for rural educators.

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OVERVIEW

Increasingly complex problems of interdependence within the educational community brings about a much greater need for persons and groups to collaborate, to ask for and to give help and to support each other.

The focus of Eastern Oregon State College's educational opportunities to educators in rural eastern Oregon is not only on the production of knowledge or on the conceptual integration of such knowledge but also on its utilization in educational arenas of action. Curriculum collaboration between the college programs and the professional schools is being facilitated through the vehicle of the "Rural Based Teacher Education Program" Grant Project. The application aspects of this effort to translate theory and knowledge are facilitated through the School of Professional and Applied Studies and Ackerman Laboratory School.

Research into the nature of a helping relationship suggests that dependency on the helper is usually not in the long-range interests of the client. Clients must have an active role in the solution of their own problems. This booklet is designed to assist Grant Clients to become active participants in the development of their educational program, whether it relate to certification or degree program needs or to professional and curriculum development needs.

To facilitate desirable student learning and attitudinal outcomes, clients will be encouraged to become active in the areas of problem solving, of generating and using resources, and of setting up collaborative efforts with "linkers" - two-way interactions in the process of seeking, giving, and receiving help related to their program needs.

The term "linking agent" (linker) will be synonymous with terms such as "change agent," "extension agent," "field agent," "educational consultant," "mentor," or "professor."

The focus of this booklet will be on a model of consultation which will increase the effectiveness of the consulting process. It will refer not to the content of the consultant intervention but to the manner in which it is carried out.

This type of organizational developmental intervention is not intended to be an isolated educational event but is designed to become a total plan for an educational organization's improvement. Hopefully, not only will the solution of immediate educational needs occur but also concurrently the educational organization's ability to anticipate and solve similar problems will be developed. Consequently, the result will be an increase in the ecological wisdom of all the participant educational systems' ability to survive and grow in their respective environments.

QUESTION/ANSWER

Question 1 - What type of roles can a linking agent serve?

The linking agent can serve a variety of roles:

1. Inforamtion Specialist
2. Trainer/Educator
3. Joint Problem Solver
4. Identifier of Alternatives and Linker to Resources
5. Fact Finder
6. Process Counselor
7. Objective Observer/Reflector
8. Evaluator

One role of a linker is that of information specialist. Even though the needs of both the linker and the client may encourage this role of EXPERT, the linker should not follow this behavior pattern exclusively. Not only does this model build dependency, it may lead to poor problem solving because of limited consideration of alternatives. The ownership of the solution needs to rest with the client. The use of this role must be selective and restrained. If advice and recommendations are given the linker will want to act as a catalyst and procedural helper in implementing the recommendations that have been made.

The trainer/educator role of a linker may be desirable. The linker may function with the client as a team member in a joint endeavor. This gives them an opportunity to joint problem solving and sharing of areas of expertise. It helps the linker to train the client with certain competencies with new skills or enrich the

client's current job performances (i.e., diagnostic/prescriptive skills, instructional strategies, curriculum innovation). One major asset of this role is helping clients learn how to learn. Another asset is the new insights gained by the linker.

Some linkers serve a role as a joint problem solver. The linker maintains objectivity while stimulating ideas and interpretations during the stage of formulating and clarifying a problem with a client. Basic factors that cause a problem or maintain it are isolated and defined. Analysis of alternative solutions and action decision making are joint "peer" endeavors. Linkers in this role can facilitate the use of and expansion of client resources which may save the client time and resources.

In another helping relationship the linker may function not as a participant in the decision making itself, but as a retriever of appropriate alternatives available to solve the problem and as a linker of the client to inside and outside resources.

Fact finding is an integral part of the linker process. This may involve listening, formal surveys, etc. Several methods for gathering facts is suggested, they include the collection of data by:

1. Interviewing
2. Questionnaire
3. Observation
4. Analysis of records and documents
5. Administration and analysis of appropriate tests.

Some of the key variables to consider when choosing a fact-finding method include the following:

1. Time
2. Cost: money and human resources
3. Needs: Which technique best fits the current need of the client? Which method is most appropriate in terms of approach?
4. Nature of client: What are the values of the client? Which technique is most appropriate for the client?

An ethical helper must always take care to respect confidences and to protect the sources of information.

Question 2 - Who can serve as a linking agent?

The linking agent will be assigned by the Project Coordinator upon approval by appropriate administrators. This person may be a college professor or instructor, a teacher, an administrator, or the Project Coordinator. College requirements as well as State Teachers Standards and Practices guidelines will be adhered to. This assignment will be discussed with the linking agent and with the client prior to its designation.

Question 3 - Who will be the client?

The client may be a teacher, administrator, aide, substitute, or other staff member of an educational agency in specified grant project counties and/or districts. The client must make a formal application (Form 1). This application for participation in the Grant Project must be made through respective county Grant Coordinators.

The Grant Coordinator will conference with the applicant and their respective administrators. Approval will be made in writing (Form 2).

Question 4 - What are the steps recommended for a linking agent-client relationship?

Each step in the interaction process between the linking agent and the client will confront them with a series of interaction decisions and possible alternatives for behavioral strategy. Several steps or focuses will be recommended for a linker-client working relationship. It may be desirable to adapt these steps to a tentative timeline (Form 3). This may be the time to discuss the various linker roles and to determine and clarify which are desirable for each situation. At the same time, resources (people, sites, materials, etc.) which may be related to need areas and activities, should be considered.

NOTE: Read the rest of this booklet before completing Form 3.

Question 5 - What is meant by the intervention process?

The intervention is anything that the linker or client does related to the client's need. It could be stated that anything that is done which affects the functioning of the client's educational system is considered an "intervention." One must recognize the fact that whatever affects the client affects his/her educational system. This, also, has a reciprocal effect on the linker's educational system. Consequently, this intervention interaction process

not only involves two people - a linker and a client - but it involves their representative educational systems. As more people become involved in team interactions, more complexity is automatically introduced.

Question 6 - What is the Coordirator's role?

The Coordinator serves as a facilitator who is available to help in any way at any time. It is very important that the linker and the client maintain active feedback and communication on their program with the Coordinator. They should utilize assistance whenever necessary from the Coordinator. The Coordinator can intervene and provide clarification. Many times this will facilitate the client's program development where otherwise it might lag. The Coordinator has access to many options and educational systems. The linker and the client should complete Form 4 jointly or separately concerning their program. This should be sent to the Coordinator at least monthly. These will be kept in a central file for perusal by Grant Coordinators and Evaluators. These will serve as verification for Grant expenditures such as substitute fees. A client may obtain approval from the coordinator and their administrator for a substitute. The district will send a requisition for reimbursement to the Grant Coordinator (Form 12).

Question 7 - What are some ways in which a linking agent may intervene?

The linking agent has many options for intervention and for modes of instruction. The list which follows is a sampling of the many options:

1. Inservice.
2. Training conferences, workshops, and seminars.
3. Programmed instruction - this might include audio-visual media supports.
4. Role playing - this might extend into demonstration teaching and modeling followed by client imitation and linker feed-back.
5. Observation and feedback.
6. Simulation and games - artificial situations may be experienced.
7. Demonstrations.
8. Visitations: model sites, state conventions, in-school review of curriculum, resources (persons, materials, etc.).
9. Process observation - comparisons can be made related to client's own processes in order to consider their adequacy or desirability.
10. Individual conferences.
11. Telephone conferences.
12. Individualized (or group) research and study.
13. Data Feedback - assessment is made of the "current state of affairs" or to provide insight about causal relationships.
14. Action research - the Dick or Briggs and Gagne' models are examples which may be followed.
15. Improving communication - the intervention may initially focus on clarifying and specifying the present program, its curricular intentions and dimensions.
16. Logical analysis - achieving a correct understanding of how things happen in a system and how the subparts affect each other.
17. Values exploration - exploration of underlying values and philosophy and clarifying how change would affect these values. This may involve a recognition of biases and values held by linking agent and by client before a comfortable communication base can be established.
18. Negotiation - every viable program will involve negotiation (i.e., teacher visitation, program change or development, etc.)
19. Structural change - this may occur at a classroom level or at a school system level. Concern related to the flexibility of the system to make changes and the permeability of the boundaries between parts of the structure is to be considered in the initial stages of the planning process. The feasibility of the linker's roles may be determined at this point. This not only relates to the client's educational system but also to the linker's educational system! Sometimes difficulties can be resolved when these changes are assessed early in the process. The importance can't be over emphasized of the maintenance of a continual feedback dialogue between educational systems administrators, linking agents, clients, and coordinators. The Coordinator's role is critical at this

point and should be utilized. Many times a Coordinator can facilitate solutions to problem situations when a linker and/or a client would not, simply because the Coordinator has access to more systems and options.

20. Normative change - aims at altering the ways people expect things to happen and to be done. As clients assess their needs and begin to personalize courses, they are changing from the "normative process" for educational opportunities or for inservice. Many of the linking agents are engineering a "normative process" change in the college educational system. The evolution of this change process results in organizational change in the involved educational systems. The Coordinator's role in facilitating this evolutionary process is critical.
21. Multiple entry - calls for several parts of a system to be intervened within complementary, mutually supportive ways. A multiple entry strategy which maintains or improves congruence and balance of the system is often essential. The Coordinator's facilitative role should promote this congruence.

If a client utilized a variety of intervention strategies in personalizing a course, he may become involved with support services from more than one School at the college, with an agency from the State Department of Education, with several school districts, and with an Educational Services Department. In the process of facilitating this program a new role for the Laboratory School faculty might be established. The client's educational system would be affected. The crucial "orchestration" of this client's intervention process would be the Coordinator's role. However, the major linkers may be one or two college professors.

Question 8 - What strategies can a linking agent utilize to facilitate a client's training program?

In facilitating an intervention strategy of training, the linking agent may take the role of:

1. Referrer to a training workshop;
2. Linker to a trainer to be brought in, trainer conducting the training;
3. Manager of a sequence of training events conducted by others;
4. Process observer of effects on the system; or
5. Data analyzer concerning the effects of training in the system.

If a linker switches roles, it is important that clarity is maintained with the client related to the role change. The client's expectations of the linker will have to change with the linking agent role change.

The linker as an advocate may build dependencies if a "content advocacy role" is served: the linker influences the client to choose particular goals or to accept particular values and actions. On the other hand, the linker may serve a "process advocacy role" by influencing the client to become active as a problem solver by using various problem solving methods. The client may "expect" the linker to assume the content advocacy role. This is the traditional professional role. The linker and client should discuss this point.

Question 9 - What are some helpful ideas for a linker and a client in building their communication process?

Each step of the interaction process between the linking agent and the client involves decision making. As the process evolves from step (phase) to step (phase), a degree of flexibility should be maintained. As new understandings and insights are gained, adaptations and modifications to program direction occur.

The client's program scope may narrow and become more defined and specific or it may expand and evolve into a series of long range programs. The client may evolve from one person to an educational system.

Initially a client has a sense of a problem accompanied by an awareness of certain expectations for help. This is the beginning point from which the linker-client communications begin. Communication barriers must be overcome. An understanding must be built. This is an important aspect of the client's program success.

There's a story told of George V. Denny, Jr., founder and moderator of the radio program "America's Town Meeting of the Air":

> Denny had a ball he liked to display when the question of tolerance came up. Grasping the ball tightly in his hand he would ask, "What color is it?"
>
> The person questioned would take a quick look and answer, "Black."
>
> Denny would then shake his head, "The part I see is white." He would give the ball a twirl to show the other half, white.
>
> "We could never agree on the color of this ball," Denny would point out, "unless you knew my point of view and unless I realized you were looking at it from another point of view."

This analogy points out the importance of the linker-client communication process so they can look at the problem from various points of view. This should take place during the "Scouting" step (phase).

Appendix B includes a self analysis learning style inventory. This could be used as a get acquainted tool between linker and client.

Question 10 - How should a problem be approached by a linker and by a client?

SCOUTING

One of the most challenging tasks of the "Scouting" phase is problem identification and definition. This should not be considered an "end result" because the problem will evolve as the program evolves.

However, it should be noted that a prerequisite to problem identification is the client's attitude in his/her ability to succeed; in his/her ability to listen to their own logical and sensitive conclusions. This may involve some self-analysis. Don Koberg and Jim Bagnall in The Universal Traveler suggest that people are kept from the solution of their problems by their own pride, fear, jealousy, and competitiveness. Fear is simply the reluctance and anxiety to deal with the unexpected or the result of lack of preparation to deal with the EXPECTED. Consequently, Koberg and Bagnall suggest that fear misdirects our energy and restrains us from action.

Creativity is blocked by:

Fear of making mistakes;
Fear of being seen as a fool;
Fear of being criticized;
Fear of being used;
Fear of being alone;
Fear of disturbing traditions;
Fear of being associated with taboos;
Fear of losing the security of habit;
Fear of losing the love of group;
Fear of being an individual. (5, p. 14)

Hepefully, linkers and clients can utilize the information in this pamphlet to assist them in overcoming barriers to the successful problem

solution by developing a logical process as they map out the problem and solution process.

ENTRY

After the Scouting phase evolves the "Entry" phase of the process. An old Zen motto is, "If you want to get to someplace, you've got to give up wanting to get to the place!" In other words, in order to achieve something, you've got to get into the process of achieving it and give up the "product," in order to produce it is necessary to concentrate on process.

Once the client claims ownership to the problem situation, he/she is ready to formulate a contract and establish a communication process with their linking agent. During this period of time the linking agent and the client determine their committments of time and energy related to the problem solution. Deeper learning and greater pleasure can only be gotten via true acceptance of the realitites of the problem situation. This might include a list of the demands of the problem: Cost in money, time, stress, etc. The existing demands on the linker and on the client's life might be noted. Priorities need to be considered during the problem solution process. The anticipated benefits of the problem solution may be identified.

This is a renewal time when the client reminds himself/herself of "who's in control of their life" and to realize that freedom and self-control only come to those who accept the accompanying responsibility. Once a client accepts responsibility for the problem (or need) he/she

might consider making a public declaration. Tell at least "three" to "five" persons who are high on a list of important people about program intentions.

FORMULATING A CONTRACT

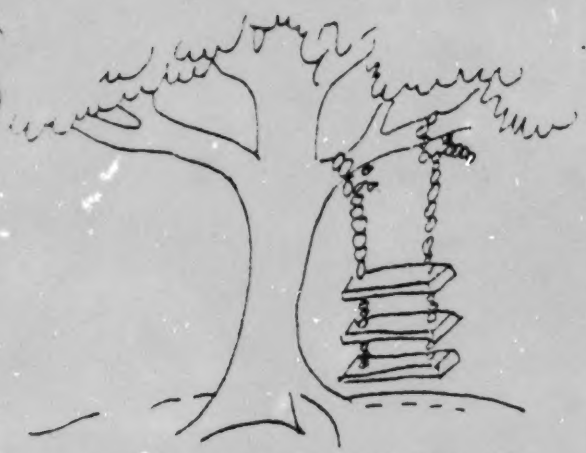
Following this entry phase a type of contract might be developed. This would include enrolling in appropriate college courses (Forms 5 and 6). Clients can take up to six hours of credit per term and receive "on-campus" credit. This may be undergraduate or graduate course work depending upon the client program needs. This course fee should be paid at this time. Clients do have an option of using the college deferred payment program. If this is the case, Forms 7 and 8 should be completed by the Coordinator and turned in with the course registration and the initial course payment. Linkers should acquaint the client with campus course goals which will be personalized in the ensuing process.

ESTABLISHING A HELPING RELATIONSHIP

Succeeding stages of the problem solving process will begin to evolve and be specified. Appendix C includes a partial inventory of decisions recommended by Lippitt and Lippitt in The Consulting Process in Action. The linking agent and the client may desire to formulate their own inventory of decisions utilizing this reference as it may serve their purpose.

This may be the appropriate time for the linker to do a self-assessment survey of his/her areas of consulting competence. The result

SPEAKING OF DESISNING TRAINING.....



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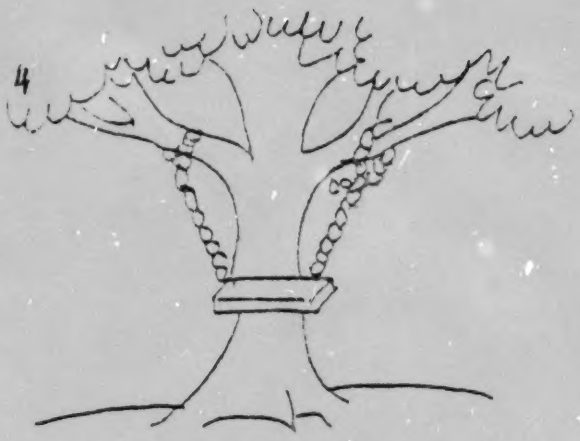

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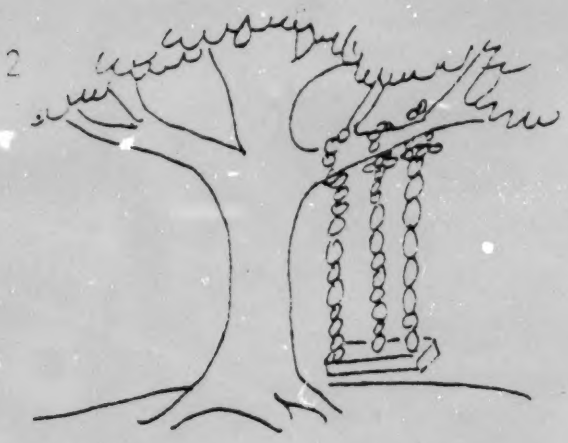
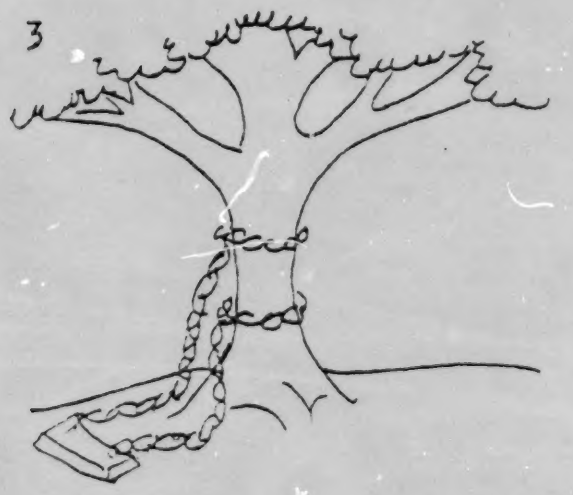


AS ENGINEER PROPOSED IT

AS CONTRACTOR INSTALLED IT



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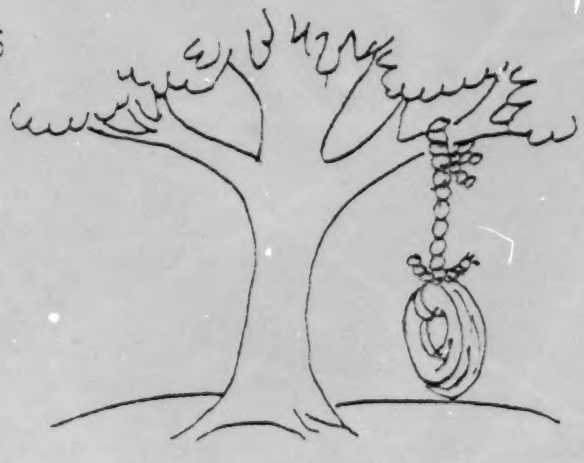


WHAT THE CLIENT REALLY WANTED

We would like to be able to give credit, however, source unknown.

of this survey may assist the linker in defining his/her role in the client's program (Appendix D).

Learning is not a matter of filling a void with information. It is a process of internal reorganization of a complex of thought patterns, perceptions, assumptions, attitudes, feelings and skills; and of successfully testing this reorganization in relation to the problem (need).

As the process evolves, so evolves the problem (need). What may have been too many flies in the house may evolve to a hole in the screen door. Consequently, the problem diagnosis and definition evolves throughout the whole solution process.

GOAL SETTING AND PLANNING

By this stage of the process the client may be ready to personalize the course goals and to establish a specific model or process for designing the training events. The "S-T-P Model of Problem Analysis: Definitions" and the "Research Utilizing Problem Solving" models may provide ideas for developing this process (Appendix E).

Preparing charts sometimes facilitates the process of formulating a contract and establishing a helping relationship. They assist by

1. Clarifying the desired outcomes;
2. Specifying who will be responsible for what, as well as
3. Denoting time perspective and accountability (Appendix F).

One of the most valuable sources of data is feedback. Several ideas related to feedback are included in Appendix G. Anecdotal records, checklists, and questions are valuable.

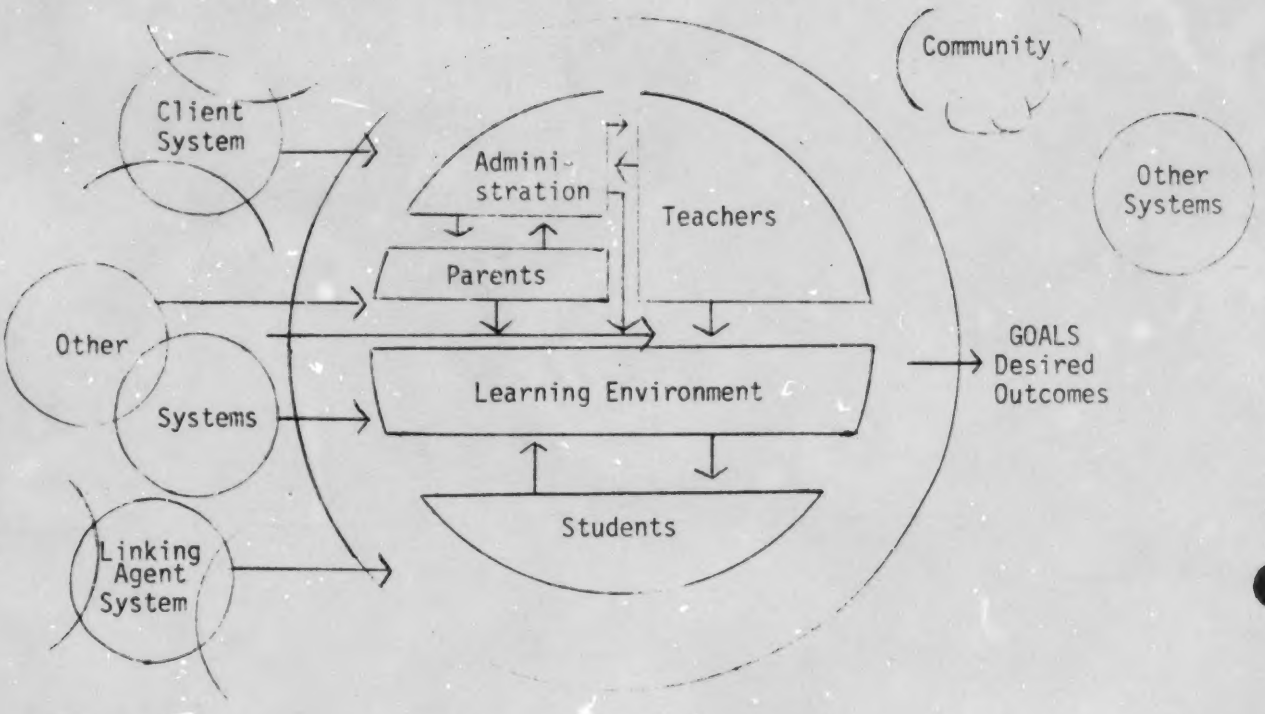
Monitoring/evaluation processes should be initiated at this time. The following are expamples which could be considered:

1. Anecdotal records;
2. Video-tape, cassette recordings, slide-tape, etc;
3. Student self-report;
4. Administration observations;
5. Letters;
6. Examples of products;
7. Personalization of course goals;
8. Parent report;
9. Others.

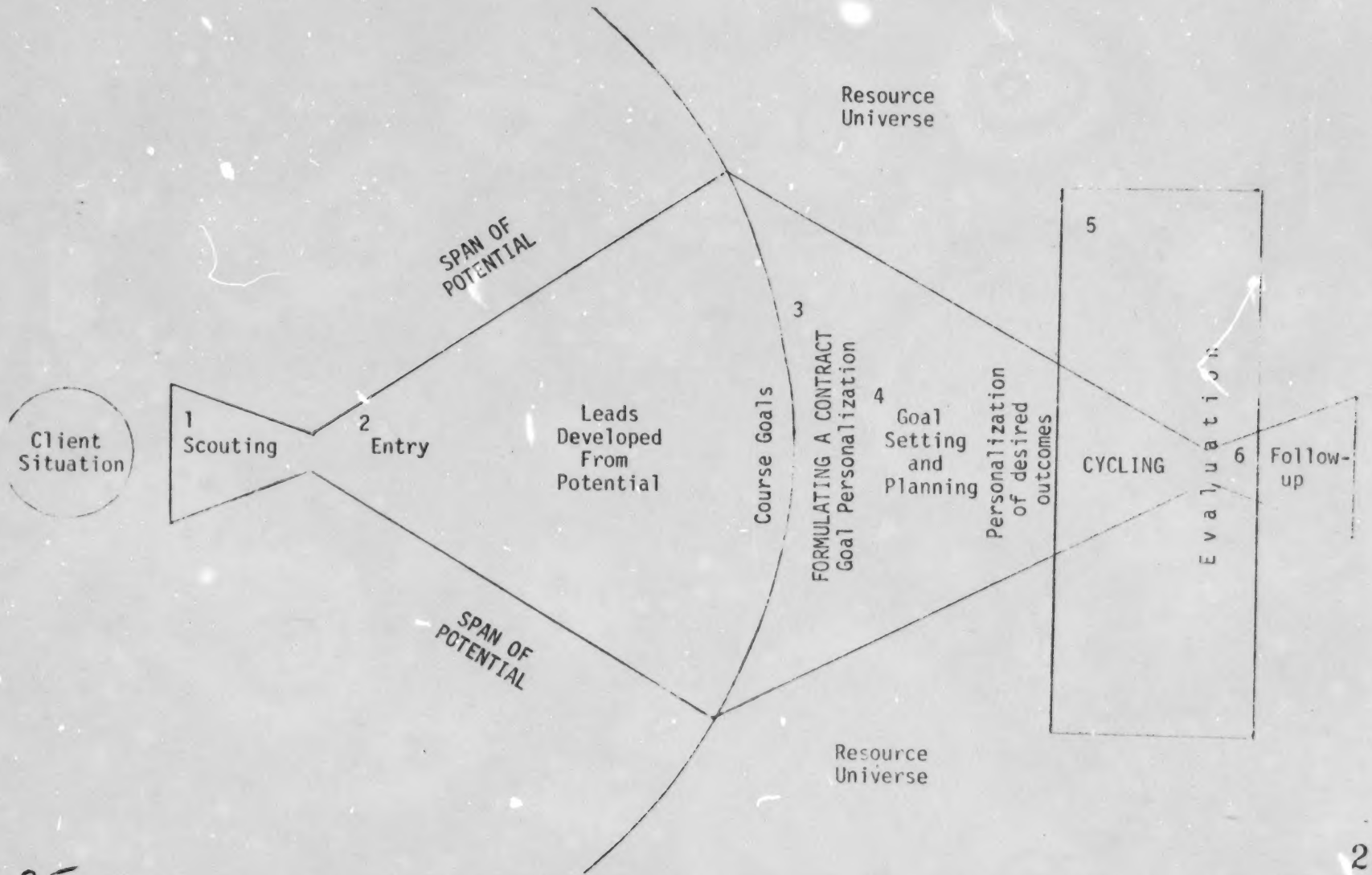
ACTION AND CYCLING - FEEDBACK

Several forms need to be completed by the linking agent prior to "off campus" visitations to clients. If the linking agent is a professor at EOSC, they must complete Form 9 a week to ten days prior to the off campus visitation. This must be approved by their Dean. If he/she plans to use a college vehicle, Form 10 must, also, be completed and submitted through the Dean's Office for verification of approval. Since the college has a travel energy conservation plan, linking agents are encouraged to travel in teams whenever possible. After the visitation Form 11 must be completed and submitted to the appropriate Dean. This must be done immediately following the visitation.

By this phase the linking agent and the client have a working understanding and can proceed with the client's program. They will have assessed the various learning climates and will have made entry into those learning climates. Goals have been clarified and personalized in light of desired program outcomes. An evaluation process has been initiated whereby change can be validated as it evolves.



This is the point at which the linker and client ask the question: Do we have sufficient data and resources for developing the program which will achieve the client's goals?


Resource Universe
SPAN OF POTENTIAL
Client Situation
1 Scouting
2 Entry
Leads Developed From Potential
3
Course Goals
FORMULATING A CONTRACT
Goal Personalization
4
Goal Setting and Planning
Personalization of desired outcomes
5
CYCLING
Evaluation
6
Follow-up
SPAN OF POTENTIAL
Resource Universe

Another decision that evolves during this phase of program development is related to the boundaries of the client's program. The program may have developed into a five-year long range program with phase I specified. It may be realized at this stage of the program development that the program goals and direction will have to be adapted to accommodate the organizational structure's system goals. Utilization of resources may be adapted to feasibility criteria (i.e., district negotiated guidelines).

By far the most important consideration relates to the students in the district classroom(s) who will be affected by the client's program. This affect must be analyzed and evaluated. The over-all program goal should bring about a resultant, positive effect on student's learning processes and attitudes toward the learning environment as well as their self-concept in that environment.

In the Action phase the key function of the linker is a support/facilitator role. Another function is monitoring the progress and provision of feedback in light of the outcome goals. Even at this point some adjustment in goal direction may need to be made, however, it is very important that the client realize a degree of fulfillment and closure - of attainment!

TERMINATION - FOLLOW-UP AND EVALUATION

The final phase (step) of development of the program may include a design for continuity of support as a part of the contracted termination agreement. One thing which should be considered is that a professional responsibility of a linking agent is to become progressively unnecessary. Some linkers and clients may desire a termination celebration as the final product of their collaborative effort. Others may establish periodic review sessions.

"Having read this pamphlet you are ready to go back to Question 4, page 6, and proceed. Good Luck!"

BIBLIOGRAPHY

The following references served as invaluable resources in the development of this pamphlet.

1. Barth, Rodney J., Comp. An Annotated Bibliography of Resources on Educational Linking Agents: Roles, Functions, and Training Materials. Ed. Com. Associates, Vienna, Virginia, Feb. 1979.

2. Emory, R. and R. Pino, Preparing Educational Training Consultants: Organizational Development (PETC-I), Commercial-Educational Distributing Services, 8116 S.W. Nimbus, Beaverton, Oregon.

3. Havelock, Ronald G., The Change Agent's Guide to Innovation in Education. Educational Technology Publications, 1973.

4. Jung, Charles C., Preparing Educational Training Consultants: Organizational Development, (PETC#). Northwest Regional Educational Laboratory.

5. Koberg, Don and Bagnall, Jim, The Universal Traveler. William Kaufmann, Inc., 1974.

6. Kolb, David A., Grohman, Alan L., "Approach to Consulting."

7. Lippitt, Gordon and Ronald Lippitt. The Consulting Process in Action. University Associates, Inc., 7596 Eads Avenue, La Jolla, California 92037. c 1978.

APPENDIX A - FORMS

FORM -1- PROJECT APPLICATION

NWAF PROJECT

Teacher/Administrator_____
print name

District and School_____Phone_____

Home Address_____Phone_____

Years Taught_____

Certificate(s)_____

Degrees/College(s)/University(ies) Attended:

_____

_____

_____

_____

_____

Special Instructional Interests/Strengths:

_____

_____

_____

_____

_____

EASTERN OREGON STATE COLLEGE
La Grande, OR 97850

Margo Mack
Education Division
Phone 963-2171 ext 379

Joanne Williams
Education Division
Phone 963-2171 ext 444

PROFESSIONAL DEVELOPMENT NEEDS

Note: The goals of this study will be used when reviewing your "needs." The goals are listed in priority order.

To:

A. Improve instruction delivered to students.

B. Tie development to local school and teacher needs.

C. Meet certification (basic or advanced) requirements.

D. Provide general development and/or advanced degree work.

1. STATE SPECIFIC NEED(S)

Relate each need to above goals. Please attempt to be as diagnostic as possible when stating your needs.

2. ADMINISTRATOR-TEACHER REVIEW STATEMENT

Please provide a critique of item No. 1 through an appropriate conference/conversation. The focus of the conversation should be on the relationship(s) between needs and study goals. Concerning goal No. 1 (to improve instruction delivered to students) questions of how instructional improvement can be reviewed/measured should be covered in this statement.

3. RELATED COURSE REQUIREMENTS

State specific course(s) needed to serve above, especially if certification needs are involved.

4. NON-COURSE REQUIREMENTS

State specific non-course requirements needed to serve the above.

5. Potential BEST study/learning arrangements for meeting teacher/administrator needs (times, styles, place).

With all of the above information in hand a review of the Client and Linker Participant needs and their relationships will be undertaken. From this review, delivery systems will evolve to serve as many of these interests as possible. Follow-up conversations will be a necessity with those teachers/administrators involved.

FORM -2- CLIENT ACCEPTANCE

Name _____

District, School & Position _____

Home Address _____

Business Phone _____ Home Phone _____

This is to inform you that your application has been received and reviewed.

CONGRATULATIONS!

Approval of your participation as a client in the Eastern Oregon State College School of Professional and Applied Studies Rural Based Teacher Development Program Grant Project, funded by Northwest Area Foundation Grant Funds, is herewith granted.

You will need a conference with your Grant Coordinator, _____ and receive your linking agent assignment. (This may be arranged by telephone.)

Phone _____ _____

Office Home

FORM -3- STEPS FOR A LINKER-CLIENT WORKING RELATIONSHIP

Activities (Related to perceived areas of need)	Resources	Time	Linker Role
SCOUTING -Linker assignment			
ENTRY -Problem definition -Communication between linker-client			
FORMULATING A CONTRACT -Establishing communication processes -Course assignment -Resource search			
GOAL SETTING AND PLANNING -Course goal personalization -Evaluation plans			
ACTION AND CYCLING FEEDBACK			
TERMINATION -Follow-up -Evaluation			

(This form will be revised as the process evolves.)

FORM -4- SUMMARY TO COORDINATOR

Name _____

Linker _____ Client _____

VISITATIONS

_____ _____
Name of Initiator Date

_____ _____
Person Visited Time Involved

_____
Person Substituting

Major purpose: _____

_____

_____

Personalization (How was it useful?) _____

_____

_____

Feedback/Follow-up _____

_____

_____

TELEPHONE CONFERENCE

_____ _____
Name of Initiator Date

_____
Person Called

Purpose _____

Personalization _____

_____

Feedback/Follow-up _____

_____

OTHER (i.e., memo, letter, etc.)

_____ _____

Name of Initiator Date

_____

Person Involved

Purpose _____

Copy of communication attached:

To be completed by Coordinator or Grant Clerk.

Expenses incurred:

Personal _____

Grant _____

FORM -5-

EASTERN OREGON STATE COLLEGE

REGISTRATION

UNGRAD	GRAD	FACULTY	STAFF	SR. CIT.
Res ☐ Nonres ☐	Res ☐ Nonres ☐	☐	☐ GTA ☐	☐

NAME Last FIRST MI

SOCIAL SECURITY NUMBER (1–12)

TERM YEAR

COURSE REF. NO. (18–21)	PREFIX	NO.	SECT.	CR. HRS (22–23)	GRAD CR. (X) (25)	AUDIT (X) (26)	REPEAT (X) (27)	DIVISION APPROVAL
(30–33)				(34–35)	(37)	(38)	(39)	
(42–45)				(46–47)	(49)	(50)	(51)	
(54–57)				(58–59)	(61)	(62)	(63)	
(66–69)				(70–71)	(73)	(74)	(75)	
(18–21)				(22–23)	(25)	(26)	(27)	
(30–33)				(34–35)	(37)	(38)	(39)	
(42–45)				(46–47)	(49)	(50)	(51)	
(54–57)				(58–59)	(61)	(62)	(63)	
(66–69)				(70–71)	(73)	(74)	(75)	

TOTAL CREDIT HOURS _____

FOR OFFICE USE ONLY

BASIC CRS FEES	
SPL CRS FEES	
DORM FEES	
ACCNTS REC	
LATE FINE	
TOTAL DUE	

ASSESSOR

TOTAL PAID		
TOTAL DUE		
CHANGE RETURNED		

SR0147 White to Records Office, Yellow to Cashier, Pink to Student

PRESENT TO CASHIER WITH PAYMENT

BEST COPY AVAILABLE

EASTERN OREGON STATE COLLEGE
STUDENTS RECORD OFFICE
La Grande, Oregon 97850

NON-ADMITTED STUDENT DATA FORM

INSTRUCTIONS

1. Complete this form in addition to the course request form if you are not regularly admitted to Eastern Oregon State College and wish to enroll as a non-admitted student. A non-admitted student may enroll only for six (6) credit hours or less. See the Schedule of Classes for Registration Procedures.
2. If you wish to apply for regular admission, please contact the Admissions Office, Room 101, Administration Building.

SOCIAL SECURITY NUMBER (4–12)

SENIOR CITIZENS: If you are 65 or older and wish to register as a Senior Citizen, heck here ☐

A 1 R ☐ (1–3, 14) LAST NAME (18–32) FIRST MIDDLE MAIDEN

A 3 R 1 3 (1–3, 14, 17) MAILING ADDRESS NUMBER AND STREET (18–41)

CITY (42–50) STATE (51–52) ZIP (53–57) HOME PHONE (58–74)

DATE OF BIRTH Mo Day Yr. (A 4 R 1, 14, 18–21)

☐ FEMALE (22)
☐ MALE

OFFICE USE ONLY (24–29)

☐ 1 — U. S. CITIZEN (23)
☐ 2 — NON-CITIZEN

In compliance with a commitment to the Department of Health, Education and Welfare, the College must seek to identify the ethnic background of the students. You are urged to supply this information but may decline without in any way prejudicing your enrollment.

Please enter the appropriate code number in the box to the left:

☐ (30)

1 - Black Non-Hispanic
2 - American Indian or Alaskan Native
3 - Asian or Pacific Islander
4 - Hispanic
5 - White Non-Hispanic
6 - Non-Resident Alien
7 - Decline to Respond

OFFICE USE ONLY (33–36)

ACADEMIC MAJOR

A 5 R 1 (1–3, 14) Have you previously been enrolled at EOSC? (7) ☐ YES (16) (1) ☐ NO If yes, when? _____

Do you have a Baccalaureate Degree? ☐ YES (27) ☐ NO 0 (28)

OFFICE USE ONLY

A 8 R 1 ☐ (1–3, 14, 36)

BEST COPY AVAILABLE

FORM -7-

SOC. SEC. NO.	Last Name	First	Middle	Account Number
000-00-0000	Doe,	John	R	ID NA

TO THE CASHIER: The above-named student is authorized credit in the amount indicated below toward the payment of fees

FALL_____ WINTER ✓ SPRING_____ SUMMER_____ 19 80

Var. Dept	Inst. Use	Cash Acct.
NA	NA	NA

NOTE: Deferred balance is payable in TWO Installments.

First payment due by the end of the Fourth Week of the term.	$ XX	—
Second payment due by the end of the Eighth Week of the term.	$ XX	—
TOTAL AMOUNT AUTHORIZED	$ XX	—

Approved by your initials

Date today's date

Receipt of Credit Acknowledged

Student's signature
Student Signature

Please mail a copy of this form with each payment to insure proper credit to your account.

EASTERN OREGON STATE COLLEGE DEFERRED TUITION AUTHORIZATION

Student completes this ↓

DEFERRED TUITION APPLICATION & POWER OF ATTORNEY

Name ..... (First) (MI) (Last)

SS NO. ..... Term ..... Year .....

Present Address ..... (Street or P.O. Box) (City) (State) (Zip)

Permanent Address ..... (Only if different from above address)

Employer ..... Address .....

How do you plan to obtain funds to repay this Note? .....

KNOW ALL MEN BY THESE PRESENT, that I: John R. Doe

the undersigned, in consideration of a loan of monies in the amount of $ XXX (same as total on card) to the undersigned, the same being evidenced by promissory note(s) or any renewals or extensions thereof dated as follows:

November 28, 1979 (today's date)

do hereby appoint and constitute irrevocably the Business Manager of EASTERN OREGON STATE COLLEGE as my attorney-in-fact to accept and receive service of complaint, summons, or other process issued or caused to be issued by the owner or holder of said promissory note(s) in the event of default in the payment thereof by the undersigned and action or suit is instituted thereon for collection of the amount due thereon, and the undersigned agrees to be bound by such service with like effect as if said service has been made upon the undersigned personally and in person. The said Business Manager of EASTERN OREGON STATE COLLEGE as such attorney-in-fact shall have no duties in the premisses except to forward to the undersigned, at the address or addresses shown below, any summons, complaint or other process served upon said attorney-in-fact within seven days of service thereof upon him; otherwise said attorney-in-fact shall be under no liability either to the undersigned or to the owner and holder of said note, and the undersigned agrees to save and hold harmless said attorney-in-fact in all events.

The said Business Manager of EASTERN OREGON STATE COLLEGE as attorney-in-fact shall not be bound by any change of address of the undersigned except such change as shall be endorsed hereon by the undersigned or of which notice is given to the said attorney-in-fact by certified mail.

Done and dated as of this 28th day of November, 1979 at La Grande, OR 97850.

Approved and Witnessed your signature Signature student's signature

PROMISSORY NOTE

I promise to pay to the order of the STATE OF OREGON, acting by and through the STATE BOARD OF HIGHER EDUCATION, on behalf of EASTERN OREGON STATE COLLEGE at its Business Office, without grace, for value received, the sum of $ XXX (same as total on card) in United States legal money, payable in two installments, the first due on or before February 1, 1980 in the amount of $ XXX (1st payment). A final payment is due on or before March 1, 1980 in the amount of $ XXX (2nd payment). The principal includes a finance charge of $3.00, which amounts to an annual percentage rate of XX (percent of interest) %. There is no penalty for early repayment. Five-sixth of one percent (5/6 of 1%) of the unpaid principal balance per month, computed on a daily basis, will be assessed on past-due notes.

I understand that non-payment of this obligation will result in a hold being placed on my transcript and I will not be allowed to register in any subsequent term until this debt is paid.

In case suit or action is instituted to collect this Note or any portion thereof, I promise and agree to pay such additional sum as the court may adjudge reasonable for such attorney's fees and costs that the holder of this Note may incur in the collection of same, or any portion thereof, even if no suit or action is instituted thereon. The maker waives presentment for payment, protest and notice of non-payment of this Note.

Date today's date Signature student's signature

43

* Keep white copy - give student pink copy

EASTERN OREGON STATE COLLEGE

ABSENCE FROM CAMPUS and/or TRAVEL FUND REQUEST

(Where travel funds are approved, it is understood that they can and will be cared for from division or unit travel budgets unless otherwise indicated below.)

NAME..... Date of Request.....

Dates of anticipated absence from campus .....

Purpose of absence from campus .....

Classes and/or responsibilities will be cared for by .....

Destination, conference headquarters, etc. .....

Signature .....

ABSENCE IS APPROVED AND RECOMMENDED:

(Authorization for Out-of-State Travel must be requested on special form supplied by Business Office at least 4 weeks prior to travel.)

Without Reimbursement ..... ☐ $ None

Reimbursement of transportation only (include cost of state car) ..... ☐ $ .....

Full Reimbursement (see current travel policy regarding conditions under which full reimbursement may be claimed) ..... ☐ $.....

Other Arrangements (be specific)

..... ☐ $.....

Name and number of account to be charged: .....

Signed.....
Division or Unit Administrator

REQUEST FOR TRAVEL ADVANCE

Amount of advance needed (do not include cost of state car) ..... $.....

Date advance will be picked up .....

Signed .....
Individual Requesting Advance

Requisition No. ..... Approved .....
Business Office

NOTE: To conserve on travel expense, it is suggested that this form be filed well in advance of the actual travel and that pooling of travel be considered whenever possible.

(White copy will be retained by the Business Office, blue copy to the President's Office, pink copy to Division or Unit Administrator, yellow copy to individual making request.)

BEST COPY AVAILABLE

FORM -10-
EASTERN OREGON STATE COLLEGE
REQUEST FOR USE OF VEHICLE

Date Submitted _____

Type of Vehicle _____

Special Equipment _____

_____

Destination _____

Purpose _____

Charge Account #10-_____

Pick-up Book Date _____

Time _____

Departure Date _____

Time _____

Return Date _____

Time _____

Driver (If other than requestor) _____

Requested by _____

Speedset by Moore Business Forms, Inc.

FORM -11-

T 35857

OREGON STATE BOARD OF HIGHER EDUCATION

TRAVEL REIMBURSEMENT REQUEST

ORDER OR REQUEST NO

NAME	EMPLOYEE OFFICIAL STATION OR NON-EMPLOYEE ADDRESS	
TITLE	INSTITUTION AND DEPARTMENT	DATE PREPARED

DATE	DEPARTURE ARRIVAL TIME	ITINERARY	PRIVATE AUTO		PER DIEM	MEALS			LODGING	TOTAL
			MILES	AMT.		BREAK.	LUNCH	DINNER		

DATE	OTHER EXPENSES. Transportation Fares, Registration Fees, Telephone Calls, Etc.	SUB-TOTAL
		TOTAL

SOC. SEC. OR VENDOR NO.	ABC	REIMBURSEMENT CODE	CATEGORY	EMPLOYEE CATEGORY
			080	☐ Executive Service ☐ Excluded ☐ Non-represented Represented by (Bargaining Unit) ☐ OSEA ☐ Other

REQ. NO.	ACCOUNT NO. INST. TYPE NO.	TRANS CODE	VAR. DEPT.	INST. USE	CASH ACC'T.	ENCUMBERED AMOUNT	LIQUIDATED AMOUNT	PAYMENT AMOUNT

I certify that this claim is true and correct, that no part thereof has been heretofore claimed or will be claimed from any other source.

CLAIMANT'S SIGNATURE

Purpose (Required on all requests.)

46

PRES., DIV. OR DEPT. HEAD APPROVAL

REIMBURSEMENT DATE (MO. - DAY - YR) CHECK NO.

BUSINESS OFFICE AUDIT APPROVAL

FORM -12-
REQUISITION FOR REIMBURSEMENT
FOR SUBSTITUTE TEACHER FEE

Please complete items.

1. District _____
2. Administrator _____
3. To whom fee reimbursement should be sent: _____
   Address _____
   _____
4. Substitute Name _____
   a. Grade/Subject _____
   b. Date of Service _____
5. Client Name _____
6. Purpose for absence _____
   _____
   _____

- -

Approved by Coordinator

_____
Signature

Fee: _____

Date Reimbursed _____
month day year

Check:

_____ Copy to Linker

_____ Copy to Project File

APPENDIX B - LEARNING STYLE INVENTORY

DETERMINING MY LEARNING STYLE

We invite you to complete the attached

LEARNING STYLE INVENTORY*

to assess your preferred method of learning. Please fill it in and be ready to record the results and discuss their implications during the opening session of the workshop. The attached sample may be useful to you in this exercise.

*Adapted by Douglas Wolfe and Eugene Byrne, "Variations in Learning Styles," Sourcebook of Experiential Exercises: Interpersonal Skills, Terre Haute, Indiana: Indiana State University, 1976 from David A. Kolb, Irwin M. Rubin, James M. McIntyre, Organizational Psychology: An Experiential Approach, Englewood Cliffs, New Jersey: Prentice-Hall, Inc., 1971.

LEARNING STYLE INVENTORY

This inventory* is designed to assess your preferred method of learning. As a reference point, consider the single course or experience that was most learningful for you. Then, as you complete the inventory, give a high rank to those words which best characterize the way you learned in that course and a low rank to the words which are least characteristic of your learning style in that course.

You may find it hard to choose the words that best describe your learning style because there are no right or wrong answers. Different characteristics described in the inventory are equally "good." The aim of the inventory is to describe how you learned in your most learningful course or experience. It is helpful to choose a recent situation, one which you can remember well.

Instructions

There are nine sets of four words listed below. Remembering your most learningful situation, rank order each set of words, assigning a 4 to the word which best characterized your learning, a 3 to the word which next best characterized your learning, a 2 to the next most characteristic word, and a 1 to the word which least characterized your learning. Be sure to assign a different rank number to each of the four words in each set. Do not make ties.

1. involved	_____	tentative	_____	discriminating	_____	practical	_____
2. receptive	_____	impartial	_____	analytical	_____	relevant	_____
3. feeling	_____	watching	_____	thinking	_____	doing	_____
4. accepting	_____	aware	_____	evaluative	_____	risk-taker	_____
5. intuitive	_____	questioning	_____	logical	_____	productive	_____
6. concrete	_____	observing	_____	abstract	_____	active	_____
7. present-oriented	_____	reflecting	_____	future-oriented	_____	pragmatic	_____
8. experience	_____	observation	_____	conceptual-ization	_____	experimen-tation	_____
9. intense	_____	reserved	_____	rational	_____	responsible	_____
TOTALS	_____		_____		_____		_____

*Taken from Kolb, Rubin and McIntyre

SCORING INSTRUCTIONS

STEP 1. Score your Learning Style Inventory by circling the number you have assigned to the words in each of the columns.

1st column: receptive, feeling, accepting, intuitive, present-oriented, experience

2nd column: tentative, watching, observing, reflecting, observation, reserved

3rd column: analytical, thinking, evaluative, logical, conceptualization, rational

4th column: practical, doing, active, pragmatic, experimentation, responsible

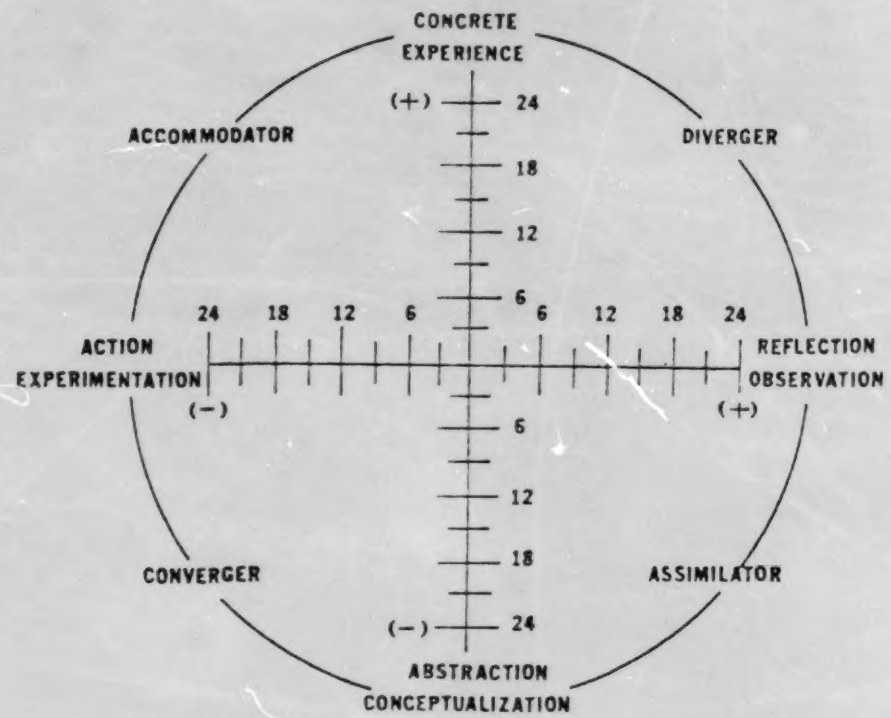
STEP 2. Sum the circled numbers in each column and record the sum in the space provided at the bottom of each column.

STEP 3. Transfer your column scores to the attached Scoring Sheet and subtract column 3 from column 1 and column 4 from column 2, retaining the sign. Plot the two resulting scores on the graph to locate the single point representing the participant's learning style.

(Alternatively, the score from each column may be plotted from the intercept toward the relevant phase of the learning cycle. By connecting the four plots, an unevenly-shaped "kite" is formed. The relative size of the area of the triangle in each quadrant indicates the relative preference of learning style.)

STEP 4. Now read the attached theoretical information to determine the significance of this exercise.

LEARNING STYLE INVENTORY SCORING SHEET



(Column 1)		(Column 2)		(Column 3)	(Column 4)
Concrete Experience		Reflection Observation		Abstraction Conceptualization	Action Experimentation
(Column 1)	-	(Column 3)	=		Learning Style (e.g., accommodator)
(Column 2)	-	(Column 4)	=		

Sample

LEARNING STYLE INVENTORY

This inventory* is designed to assess your preferred method of learning. As a reference point, consider the single course or experience that was most learningful for you. Then, as you complete the inventory, give a high rank to those words which best characterize the way you learned in that course and a low rank to the words which are least characteristic of your learning style in that course.

You may find it hard to choose the words that best describe your learning style because there are no right or wrong answers. Different characteristics described in the inventory are equally "good." The aim of the inventory is to describe how you learned in your most learningful course or experience. It is helpful to choose a recent situation, one which you can remember well.

Instructions

There are nine sets of four words listed below. Remembering your most learningful situation, rank order each set of words, assigning a 4 to the word which best characterized your learning, a 3 to the word which next best characterized your learning, a 2 to the next most characteristic word, and a 1 to the word which least characterized your learning. Be sure to assign a different rank number to each of the four words in each set. Do not make ties.

Scoring Instructions Step 1

1. involved	4	tentative	(1)	discriminating	2	practical	(3)
2. receptive	(1)	impartial	2	analytical	(3)	relevant	4
3. feeling	(1)	watching	(3)	thinking	(2)	doing	(4)
4. accepting	(4)	aware	1	evaluative	(3)	risk-taker	2
5. intuitive	(3)	questioning	1	logical	(4)	productive	2
6. concrete	2	observing	(4)	abstract	1	active	(3)
7. present-oriented	(3)	reflecting	(4)	future-oriented	1	pragmatic	(2)
8. experience	(4)	observation	(1)	conceptual-ization	(3)	experimen-tation	(2)
9. intense	3	reserved	(1)	rational	(2)	responsible	(4)
TOTALS	16		14		17		16

Scoring Instructions Step 2

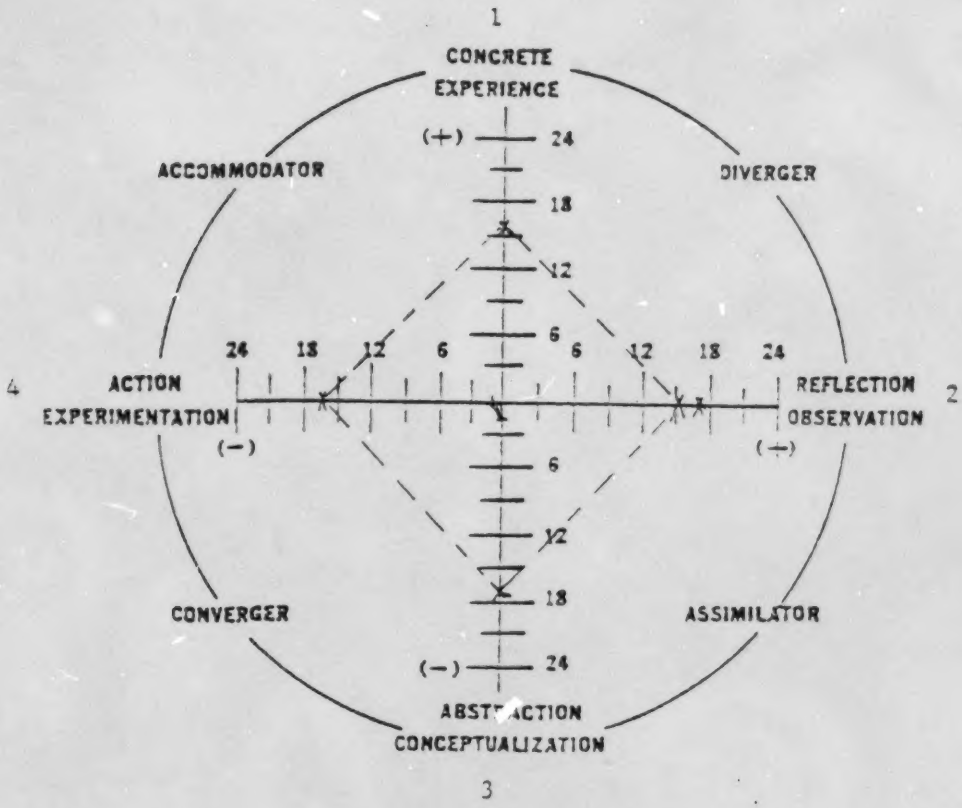
*Taken from Kolb, Rubin and McIntyre

Scoring Instructions

Step 3

LEARNING STYLE INVENTORY SCORING SHEET

Sample

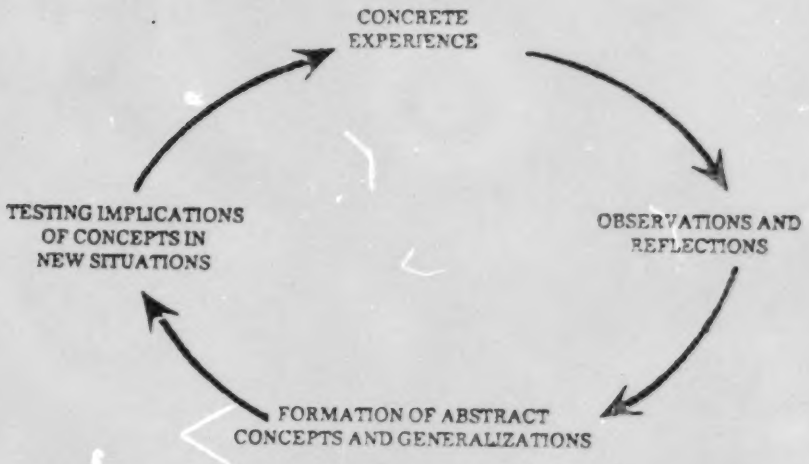


(Column 1)		(Column 2)		(Column 3)	(Column 4)
16		14		17	16
Concrete Experience 2,3,4,5,7,8		Reflection Observation 1,3,6,7,8,9		Abstraction Conceptualization 2,3,4,5,8,9	Action Experimentation 1,3,6,7,8,9
16 (Column 1) CE	−	17 (Column 3) AC	=	−1	Converger (just barely!) Learning Style (e.g., accommodator)
14 (Column 2) RO	−	16 (Column 4) AE	=	−2	

A THEORETICAL BASIS

A rather simple conceptual model* of experiential learning has been found to be particularly useful in understanding the way learning occurs. The diagram in Figure 1 represents this four phase, cyclical model. The process of learning through experience is conceived as a repetitive cycle in which the learner first engages in some concrete experience.

Figure 1: The Experiential Learning Model


CONCRETE EXPERIENCE
OBSERVATIONS AND REFLECTIONS
FORMATION OF ABSTRACT CONCEPTS AND GENERALIZATIONS
TESTING IMPLICATIONS OF CONCEPTS IN NEW SITUATIONS

This leads to reflective observations on that experience from which the learner inductively derives abstract concepts and generalizations. Once formed, these conceptualizations lead deductively to new hypotheses and actions which will test their implications, and the new actions lead to new concrete experiences which initiate the cycle again.

Each of these four phases of the cycle represent abilities and orientations which are polar opposites on two dimensions: concrete versus abstract, reflective versus active. Thus, an orientation toward abstraction tends to inhibit involvement in the concrete experience and vice versa. Therefore, there is a dynamic tension between these polar orientations which the creative learner must be aware of and use to complete the full learning cycle. Ideally, he would be able to move freely from one orientation to another as he moves through the learning cycle, maintaining a balance between these orientations.

However, most learners are less than perfect in being able to move readily from one orientation and set of abilities to another. This is, we tend to place emphasis on one or a combination of these four phases of the learning

*Much of this is taken from work done by David A. Kolb who also developed the LSI.

A THEORETICAL BASIS (continued)

cycle. As shown on the LSI Scoring Sheet, four categories of learning styles can be identified.

1. Diverger. Persons with this learning style have the ability to view any situation from many perspectives. Divergers are imaginative, interested in people and excel at generating ideas.

2. Assimilator. Excels in the ability to create theoretical models. The assimilator can take limited observations and develop an integrated explanation. This learning style displays a preference for abstraction with less concern for the practical implications of theory and for ideas more than people.

3. Convergers. The main characteristic of this learning style is the capability to focus knowledge toward the solution of specific problems. Convergers are concerned with the practical value of problem solving and, like the Assimilator, are less concerned with people and more concerned with things.

4. Accommodators. Excels at carrying out plans and becomes heavily involved in experiences. The accommodator has a high orientation toward people and is very skilled at adapting to the requirements of the immediate circumstances. A person with this learning style is likely to act quickly and is often considered to have a greater preference for risk.

Where an individual tends to place equal emphasis on both ends of one dimension, this may indicate that he or she has developed a relative balance between them, moving easily from one to the other. Or, there may be an unresolved tension, continually producing internal conflict, with the person being drawn toward both ends. He or she is likely then to exhibit characteristics of two learning styles, depending on the circumstances.

Self-Directed Experiential Learning

Learning is a continuous process, with the question, "What do I want to learn?" confronted after every learning experience. In other words we choose learning situations because we think they can answer questions and problems, and at the same time we expect the learning experience to raise new questions and perhaps redefine old ones. From this perspective the criterion for a successful learning experience is that it results in both conclusions and questions. While the conclusions represent an immediate practical outcome or problem solution, the questions provide guidelines for the choice of future learning experiences. Questions are thus the basis for setting personal learning goals.

Setting Learning Directions

An example may help describe how the questioning process can be used to set personal directions for learning:

Let us say a manager has begun to sense some questions about how to deal with the human factors in his work—how to motivate employees, improve the quality and acceptance of the decisions, improve communication and so on. One day he receives a brochure for a management training program that proposes to deal with these topics and others. After some preliminary checking on such matters as the quality of the training staff, the feasibility of getting time off and the desirability of the program location, he decides to attend. A month later he arrives at the conference center for the training program.

What we see in this example is a four-step problem solving sequence: a felt need or problem (to better deal with human factors), data collection (the brochure, questions to other resources), a goal or imagined solution to the problem (a plan to attend the program) and action (arriving at the program). The manager's learning goal has arisen from his attempts to solve a personally felt problem. How effectively that learning goal will meet his needs is primarily a result of how well he has sensed and defined his problems, i.e., how well he has asked his learning question. The data he collects to analyze his situation and his active attempts to use these data to generate and evaluate alternative solutions (goals) are the two critical factors that will determine goal effectiveness.

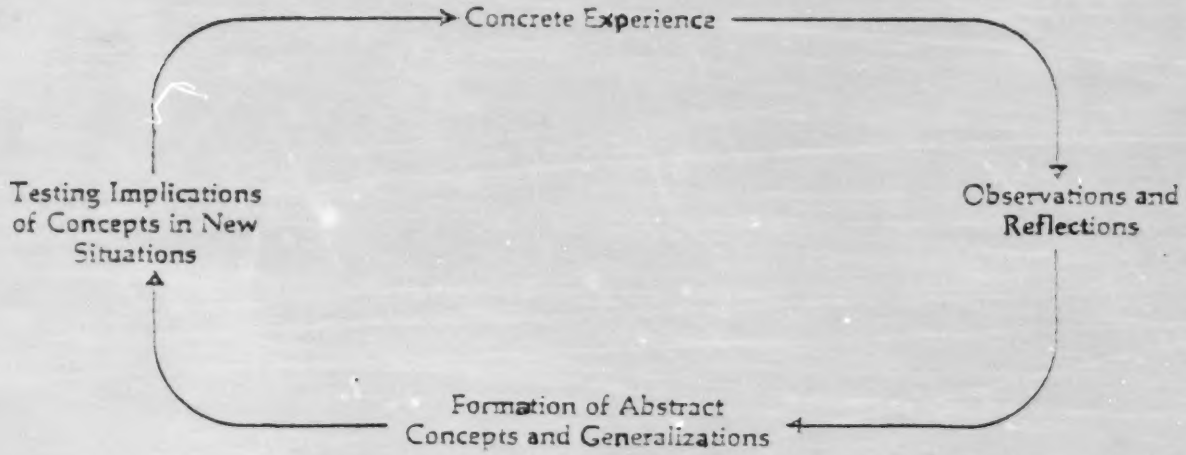
Once he has arrived at the conference, what can the manager do to continue his control over his learning and problem-solving? The answer lies in continuing to cycle through the problem solving process that brought him to the program in the first place. While we have described the four-stage problem solving process in linear terms, it is really a continuing cycle leading to new experiences that cast old problems in a new light and offer new resources for re-solving the problem.

Experiential Learning Theory: How Do I Learn Best?

The four-stage problem solving model (problem—data collection—solution (goal)—action) can be seen as a description of the learning process itself. The focus of the model is a simple

description of the learning/problem solving cycle—of how experience is translated into concepts which in turn are used as guides in the choice of new experiences.

THE EXPERIENTIAL LEARNING MODEL


Concrete Experience
Observations and Reflections
Formation of Abstract Concepts and Generalizations
Testing Implications of Concepts in New Situations

Immediate concrete experience is the basis for observation and reflection. Observations are assimilated into a "theory" from which new implications for action can be deduced. These implications or hypotheses then serve as guides for acting to create new experiences. The learner, if he is to be effective, needs four different kinds of abilities: Concrete Experience abilities (CE), Reflective Observation abilities (RO), Abstract Conceptualization abilities (AC) and Active Experimentation (AE) abilities. He must be able to involve himself fully, openly and without bias in new experiences (CE); he must be able to reflect on and observe these experiences from many perspectives (RO); he must be able to create concepts that integrate his observations into sound theories (AC); and he must be able to use these theories to make decisions and solve problems (AE).

More specifically, there are two primary dimensions to the learning process. The first dimension represents the concrete experiencing of events at one end and the abstract conceptualization at the other. The other dimension has active experimentation at one extreme and reflective observation at the other. Thus, in the process of learning one moves in varying degrees from actor to observer, from specific involvement to general analytic detachment.

Before reading further, please take the Learning Style Inventory When you have scored the Inventory, continue reading.

Learning Styles

Most people develop learning styles that emphasize some learning abilities over others. A manager may be primarily concerned with the active application of ideas, while a naturalist may develop his observational skills highly.

The Learning Syle Inventory (LSI) on page 00 is a self-description inventory, designed to measure an individual's strengths and weaknesses as a learner. It measures an individual's relative emphasis on the four learning abilities described earlier—Concrete Experience (CE), Reflective Observation (RO), Abstract Conceptualization (AC) and Active Experimentation (AE)—by asking him to rank four words that describe these different abilities. For example, one set of four words is "Feeling" (CE), "Watching" (RO), "Thinking" (AC), "Doing" (AE). The inventory yields six scores—CE, RO, AC, AE and two combination scores that indicate the extent to which an individual emphasizes abstractness over concreteness (AC-CE) and the extent to which an individual emphasizes active experimentation over reflection (AE-RO).

The LSI was administered to 800 practicing managers and graduate students in management to obtain norms for the management population. In general these managers tended to emphasize Active Experimentation over Reflective Observation. In addition, managers with graduate degrees tended to rate their abstract (AC) learning skills higher.[1] While the individuals tested showed many different patterns of scores on the LSI, we have identified four statistically prevalent types of learning styles: the Converger, the Diverger, the Assimilator and the Accommodator.[2]

The Converger's dominant learning abilities are Abstract Conceptualization (AC) and Active Experimentation (AE). His greatest strength lies in the practical application of ideas. We have called this learning style the "Converger" because a person with this style seems to do best in situations like conventional intelligence tests where there is a single correct answer or solution to a question or problem (Torrealba, 1972). His knowledge is organized in such a way that, through hypothetical-deductive reasoning he can focus it on specific problems. Liam Hudson's (1966) research in this style of learning (using different measures than the LSI) shows that convergers are relatively unemotional, preferring to deal with things rather than people. They tend to have narrow interests, and choose to specialize in the physical sciences. Our research shows that this learning style is characteristic of many engineers (Kolb, 1973).

The Diverger has the opposite learning strengths of the converger. He is best at Concrete Experience (CE) and Reflective Observation (RO). His greatest strength lies in his imaginative ability. He excels in the ability to view concrete situations from many perspectives and to organize many relationships into a meaningful "gestalt." We have labelled this style "Diverger" because a person with this style performs better in situations that call for generation of ideas such as a "brainstorming" idea session. Hudson's (1966) work on this particular learning style shows that divergers are interested in people and tend to be imaginative and emotional. They have broad cultural interests and tend to specialize in the arts. Our research shows that this style is characteristic of persons with humanities and liberal arts backgrounds.

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[1] The details of the inventory construction, along with preliminary reliability and validity studies, are described in Kolb (1971). The inventory itself, along with management norms, appears in Kolb, Rubin and McIntyre, *Organizational Psychology: An Experiential Approach*, Prentice-Hall, 1971.

[2] There are four dominant styles because AC and CE are highly negatively correlated, as are RO and AE. Thus, individuals who score high on both AC and CE or on both AE and CE occur with less frequency than do the other four combinations of LSI scores.

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The Assimilator's dominant learning abilities are Abstract Conceptualization (AC) and Reflective Observation (RO). His strength lies in his ability to create theoretical models. He excells in inductive reasoning, in assimilating disparate observations into an integrated explanation (Growchow, 1973). Like the converger, he is less interested in people and more concerned with the practical use of theories. For him it is more important that the theory be logically sound and precise. As a result, this learning style is more characteristic of the basic sciences and mathematics rather than the applied sciences; and in organizations it is found most often in the research and planning departments (Kolb, 1973, Strasmore, 1973).

The Accommodator has the opposite learning strengths of the Assimilator. He is best at Concrete Experience (CE) and Active Experimentation (AE). His greatest strength lies in doing things, in carrying out plans and experiments and involving himself in new experiences. He tends to be more of a risk-taker than people with the other three learning styles. We have labelled this style "Accommodator" because he tends to excel in those situations where he must adapt himself to specific immediate circumstances. He tends to solve problems in an intuitive trial and error manner (Growchow, 1973), relying heavily on other people for information rather than on his own analytic ability (Stabell, 1973).

APPENDIX C

A PARTIAL INVENTORY OF DECISIONS IN EACH PHASE OF CONSULTATION

PHASE 1. INITIAL CONTACT AND ENTRY

1. How can I legitimize for clients their sharing of pain, problems, and sense of failure without also stimulating their defensiveness?
2. How can I ask probing questions and not mobilize feelings of irritation and hostility toward me?
3. How can I listen to and encourage the unloading of problems without appearing to accept the projections of blame and the attributions of causation of the exposed problems?
4. How can I demonstrate expertness and establish my credibility as a potential source of help without creating dependency and an expectation that I will solve the problem?
5. How can I explain readiness to work on change without appearing to assume (before diagnosis) that a lot of change is going to be needed?
6. How can I bring up and explore questions of compatibility without sounding too clinical, doubtful, or demanding?
7. How can my relevant experience and training be communicated without sounding like a sales pitch?
8. How can I be reassuring without being interpreted as saying the problem is minor or can be easily and quickly solved?

PHASE 2. FORMULATING A CONTRACT, ESTABLISHING A WORKING RELATIONSHIP

1. How can I explore potential traps and misunderstandings with clients without appearing negative or disturbing?
2. How can I strike a balance between making clients' responsibilities and commitments seem too heavy (at this early stage) and letting them make false assumptions about the amount of work that will be expected by the consultant?
3. How can I find some ways to test compatibility and skills of collaboration without entering into some irreversible commitments?
4. How can I be clear about the level of my commitment of time and energy without appearing to sell myself or have inflexible standards?
5. How can I clarify some limitations of my resources without creating loss of confidence in me?

6. How can I realistically communicate my available time and energy without discouraging the client?
7. How can I work for involvement of appropriate parts of the system without antagonizing the ingroup?
8. How can I stretch the necessary time perspective of the contract without appearing to promote more work for myself?
9. How can I write the commitment about the participation of top management without creating defensiveness and game-playing?
10. How can financial terms be definite and yet flexible in response to changes in conditions, e.g., new critical problems discovered, basic conflicts to be handled?
11. How can we define outcomes and accountability to be derived without creating traps and limitations?
12. How can division of labor be defined without too much rigidity and without scaring people?

PHASE 3. PROBLEM IDENTIFICATION AND DIAGNOSIS

1. How can I get people to open up and question their assumptions about the causes of their problems?
2. How can I get them to accept the need for objective fact finding to supplement their own data assumptions?
3. How can I introduce perspective about the time that is needed without discouraging them?
4. How can I obtain their appropriate understanding and commitment of the time and energy that will be required of them?
5. How can I involve them enough in the diagnostic data-collection process for them to feel ownership of the data and accept its validity?
6. How can I arrange for the appropriate parts of the client system to review the data and draw implications for action?
7. How can I focus on data about need and readiness for change, rather than simply working on causes of the pain or the problem?

PHASE 4. GOAL SETTING AND PLANNING

1. How can I create a psychological readiness in people to think into the future and freely imagine alternative futures?
2. How can I free them enough from inhibiting assumptions about adjusting, predicting, and feasibility to project a <u>desired</u> future based on their values?

3. How can I prevent them from choosing goals before they have tested alternatives for probable consequences?
4. How can I confront the tendency to involve too few members of the system in goal setting and planning?
5. How can I press for concreteness and measurability in goal statements without evoking a negative reaction?
6. How can I stimulate interest in step-by-step goal planning in place of a preoccupation only with big, long-term perspectives?
7. How can I support planning for evaluation as part of planning for implementation?
8. How can I help with reality testing of plans?
9. How can I help clients to explore the possible side effects and traps that are part of planning?
10. How can I push for personnel commitments of time, effort, and acceptance of deadlines without creating resistance and flight?
11. How can I stimulate clients to consider the need for and use of resources beyond themselves?
12. How can I plan for my withdrawal and the development of internal resources to replace my functions?

PHASE 5. CONVERTING PLANS INTO ACTION

1. How can I present to clients the necessity and value of action rehearsal so that it will be accepted?
2. How can I present and demonstrate the value of skill training?
3. How can I demonstrate and communicate the details of effective involvement, briefing techniques, and preparation for all implementation actions as replacements for the assumptions that good intentions and acceptance of goals are adequate?
4. How can I confront the weakness of an authoritative strategy with a process based on voluntary involvement?
5. How can I deal with the dependency of clients who want me to use my expertness to produce the action?
6. How can I introduce procedures for obtaining feedback on each action step and for using the data?
7. How can I support the use of other resources as an evidence of strength rather than weakness?
8. How can I introduce and support celebration of milestones of progress?

9. How can I help those who are taking action to understand the idea and the use of support systems and to use each other for support, reinforcement, and debriefing?
10. How can I support the commitment to document the action and the consequences?

PHASE 6. CONTRACT COMPLETION: CONTINUITY AND SUPPORT

1. How can I deal objectively with my own conflicting inclinations to see "all the help the clients still need" and also to move on to do "new and exciting things"?
2. How can I involve the client in setting goals that increase self-direction and internal support?
3. How can I make appropriate commitments for periodic support as needed?
4. How can I confront and support the need for specific deadlines on progress checkpoints, the need for renewal, and other items?
5. How can we find ways to provide support from a distance?
6. How can I support continuing plans for documentation and evaluation?
7. How can I support plans for continuing internal personnel development and internal change-agent functions?
8. How can I help to clarify the client's understanding of ongoing and potential needs for external help and appropriate procedures for securing such help?
9. How can we appropriately celebrate the completion of our contract?

APPENDIX D

EDUCATIONAL TRAINING CONSULTANT -
SOME AREAS OF CONSULTANT COMPETENCE

Name _____

Date _____

PAPER 13 SAMPLE

EDUCATIONAL TRAINING

CONSULTANT

Some Areas of Consultant Competence

Directions:

Rate yourself in Column A using digits as follows:

5 - highly competent

4 - very good now, but room for improvement

3 - little better than the average professional

2 - little below the average professional

1 - rather weak; need considerable improvement

0 - very poor, quite inadequate

How competent are you now at:	A	B
Activity	Self-rating	Peer-rating
I. Theory		
1. Explaining the processes of planned change.	_____	_____
2. Comparing and criticizing various concepts about human systems and levels of these systems.	_____	_____
3. Presenting concepts, ideas about human learning and change.	_____	_____
4. Explaining the dynamics of human systems, resistance to change, and problematic issues of systems.	_____	_____
5. Comparing and criticizing various theories about group process, interpersonal processess and organizational processess.	_____	_____
6. Presenting concepts about communication in various human systems.	_____	_____
7. Distinguishing among modes of intervention the consultant may use in various levels of human systems.	_____	_____
8. Presenting rationale for consultant intervention decisions.	_____	_____
9. Explaining the concept of differential approaches to consulting.	_____	_____
10. Distinguishing between the task of the consultant and the task of the training consultant.	_____	_____

Activity	Self-rating	Peer-rating
II. Selecting, adapting, designing: Exercises		
11. Designing an exercise to develop awareness of barriers to interpersonal communication		
12. Designing an exercise to improve personal feedback		
13. Designing an exercise to train teachers in more effective problem solving		
14. Designing an exercise to compare results from different leadership styles		
15. Designing an exercise to bring out differing results of different methods of instruction		
16. Designing an exercise to illustrate effects of resistance to learning and change		
17. Designing an exercise in methods of conflict resolution		
18. Designing an exercise to demonstrate effective ways of bringing about organizational change		
19. Designing an exercise to demonstrate relative merits of different ways of getting established groups to cooperate		
III. Diagnostician: Levels of human systems		
20. Diagnosing task performance in a group		
21. Diagnosing maintenance problems in a group		
22. Diagnosing apathy or resistance in parts of an organization		
23. Diagnosing factors responsible for the withholding of information by parts of a system		
24. Diagnosing interpersonal friction		

25. Diagnosing the onset or maintenance of organizational rigidity

26. Diagnosing unwarranted complacency in an organization or community

27. Diagnosing situations likely to lead to major conflict and schism in an organization or community

28. Diagnosing real problems which differ from apparent problems

IV. Being an effective consultant

29. Listening rather than taking initiative

30. Creating an atmosphere of openness, frankness, trust

31. Diagnosing before proposing remedies

32. Enabling clients to take responsibility for developing their own plans

33. Helping individuals develop the skills they lack

34. Enabling decision-makers to try different approaches to chronic problems

35. Enabling members of committees, teams to influence the change processes

36. Getting all concerned really involved in finding solutions

V. Personal growth

37. Using assessment techniques to measure and find out your own efficiency

38. Learning from research findings in journals of applied behavioral science

39. Learning from a wide variety of contacts with other persons doing somewhat similar work _____ _____

40. Learning by reflection, meditation contemplation, self-criticism, prayer, weighing values _____ _____

41. Learning from your immediate associates: superiors, peers, subordinates _____ _____

42. Developing new, creative ideas and schemes of operation _____ _____

43. Questioning, criticizing, keeping skeptical, cool, not carried away by enthusiasm, being tough-minded, relying on hard data _____ _____

Directions

Choose the three areas in which you feel most need and urgency to improve and put an asterisk in front of the corresponding number. These will be your first targets for guided growth.

SUMMARY

Date _____

Your competence score as:

I. Theory	$\frac{(1\text{-}10)}{50}$	= ____ %
II. Selecting, adapting, diagnosis: Exercise	$\frac{(11\text{-}19)}{45}$	= ____ %
III. Diagnostician: Level of human system	$\frac{(20\text{-}28)}{45}$	= ____ %
IV. Being an effective consultant	$\frac{(29\text{-}36)}{40}$	= ____ %
V. Personal growth	$\frac{(37\text{-}43)}{35}$	= ____ %

Instructions

Find your score in each category by adding your ratings. Compute your percentage by dividing your score by the total score in that category.

APPENDIX E

THE S-T-P MODEL OF PROBLEM ANALYSIS: DEFINITIONS*

Symptoms

We usually feel that a problem exists before we can define it. Incidents or conditions that evoke dissatisfaction, frustration, tension and other negative feelings we call symptoms of a problem. Such symptom incidents arouse negative feelings because a more desirable alternate state is implied, although the person may be unaware of what it is. Thus, we say a problem exists when we experience a discrepancy between the current state (of which we are somewhat aware) and a desired alternate state (of which we are usually unaware).

Problem Definition

Solving a problem is more than just preventing the reoccurence of symptoms. Thus, a problem is not defined until three sets of information have been made explicit. (1) What are the essential features of the current state? (2) What are the key attributes of the desired alternate state? (3) What forces facilitate and what impede our moving from the current to the more desired state? A study of symptoms can reveal information of all three types.

Problem Solution

Actions which the group members can support and which will change the current state into the more desired alternate state.

S-T-P Model

A method of organizing information to define a problem and to resolve or manage conflict that occurs in creating a solution. Information is organized into three interrelated dimensions.

The Situation Dimension:	Information about (a) the essential features of the current state and (b) the forces that facilitate and that impede moving to a more desired state.
The Target Dimension:	The desired state. What we want to accomplish and to avoid. Targets are chosen because those working on the problem value and desire them; they are not imposed. (Imposed requirements are part of the situation dimension.)
The Proposal Plan Dimension:	Specific action proposals aimed at changing the current state into the desired state. "Who will do what by when?" Any proposal for action always implies some view of the situation and of the target.

*Frederick R. Fosmire and John L. Wallen, 1971, NWREL

Here are some common expressions and terms that fit into the three dimensions:

Situation	Target	Proposal/Plan
Starting point	Termination	Path from S to T
Facts, opinions, explanations about the current conditions, predictions about efforts to change	Goals, aims, ends, values, purposes, objectives	Means, plan, strategy, implementation, procedure
Environment as the group it	Outcome desired by the group	The group's behavior

JOINT INQUIRY WITH THE S-T-P MODEL

The Dimensions Are Interdependent

An utterance about any of the dimensions encodes information about other dimensions. The meaning of the speaker's information for any dimension is clarified and elaborated by his or her view of the other dimensions.

DIMENSIONS	TYPE OF INTERDEPENDENCE
Situation--Target	Comparison: Dissatisfaction with S reflects what T is implied as standard of comparison T transforms what is unsatisfactory about current S
Target--Proposals	Implementation: means/end T defines results desired from P P embodies assumptions about conditions (alternate to S) are desired
Proposals--Situation	Limitation: P embodies assumptions about causes of unsatisfactory features of current S and resources and requirements for change S limits which proposals might be effective and feasible in accomplishing T

Because the three dimensions are so closely coupled, it is helpful to think of them as a single, interacting unit (as shown in the diagram) rather than as three separate factors related in a straight-line sequence from S to T to P.

Joint Inquiry With the S-T-P Model (continued)

A shared understanding of the problem-analysis exists when each party to the joint inquiry understands the situation, target and proposal dimensions from the other's point of view. Such a shared understanding is the objective of joint inquiry.

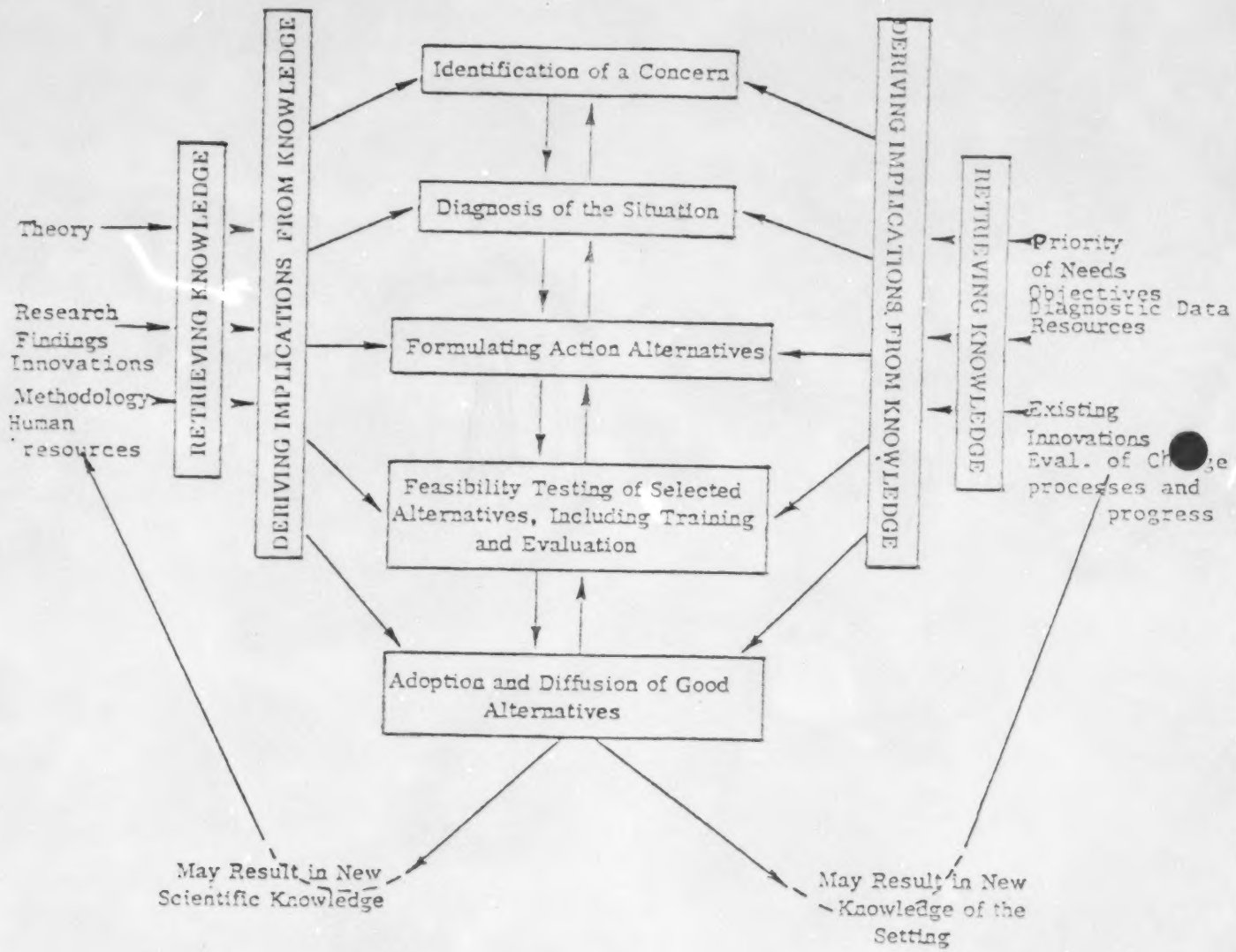
Effective Joint Inquiry Recycles Rather Than Follows A Fixed Sequence

RECYCLING AMONG S-T-P: It is usually ineffective to try to work on one dimension at a time. Agreement does not need to be reached first on S, then on T and, finally, on P. Such a rigid, mechanical sequence may arouse resentment or feelings that a comment out of sequence is inappropriate. This can stifle creativity and decrease involvement.

In a recycling approach the group discusses the problem freely and spontaneously, contributing information about S or T or P as it occurs to them. Any proposal may reveal new targets or new information about the situation. Comments about S or T, likewise, may result in information in any dimension. The form in which the information will be organized need not dictate the form of the inquiry. The interaction can be spontaneous although the information generated is recorded in three columns (or separate sheets of newsprint) headed "Situation," "Target" and "Proposals." Entries can be made in the appropriate category as they occur or are accepted by the group.

RESEARCH UTILIZING PROBLEM SOLVING MODEL *

SCIENTIFIC KNOWLEDGE ←- - - -may draw on- - - - - - THE PROCESS- - - - -may draw on- - - →KNOWLEDGE OF THE EDUCATIONAL SETTING



*Jung, Charles and Ronald Lippitt. "The Study of Change as a Concept--in Research Utilization." Theory Into Practice. 5:25-29; February 1966.

DESIGNING MODEL

DESCRIPTION OF THE SITUATION

Describe the situation producing the need for this training event. This is an analysis of the situation. Why this training event? Who wants it? For what purpose? What needs is it supposed to meet? What are the contextual factors surrounding it (e.g., political, organizational, social, programmatic, etc.)? Include forces and factors related to readiness, willingness, ability, individual, group, organization, community, limits, constraints, etc.

YOUR GOALS

In the light of the situation and your assumptions, what goals will you pursue in the training event? Write them here.

YOUR ASSUMPTIONS

In the light of the situation and your goals, what are your assumptions (beliefs) about yourself, about the participants in the workshop? Write them here.

YOUR MAJOR STRATEGIES

Your major strategies will be derived from your situation, goal and assumption statements. What will be the main things you will do? Write them here. (This need not be statements of techniques, activities or methods you will use--just note the major strategies.)

ALL PARTS OF THE PLANNING MODEL SHOULD SHOW INTERNAL CONSISTENCY. THEY SHOULD FOLLOW EACH OTHER LOGICALLY. WORK TO ELIMINATE DISCREPANCIES.

DESIGNING WORKSHEET

DESCRIPTION OF THE SITUATION

Your Goals

Your Assumptions

DESIGNING WORKSHEET - page 2

YOUR GOALS

YOUR ASSUMPTIONS

YOUR MAJOR TRAINING STRATEGIES

TRAINING TECHNIQUES

HYPOTHESIZED OUTCOMES

(What Can Reasonably Be Expected to Happen)

GOAL:

APPENDIX F

OBJECTIVE:

PROBLEM SOLVING WORKSHEETS

ACTIVITY	STATUS (To Do / Started / Working On / Done)	Person or Group Related to Activity	Other Constraints or Conditions	TIME LINE (Sept / Oct / Nov / Dec / Jan / Feb / Mar / Apr / May / June / July / Aug)

MACRODESIGNING WORKSHEET

PREPARE A DEVELOPMENT CHART

The Development Chart contains the STRATEGIES you plan to use--in the order in which you will employ them. A STRATEGY is a large unit of work--a macro-design, in effect. The STRATEGIES for this workshop are General Sessions, Work Sessions, Critiquing Sessions, and Mini-Sessions. STRATEGIES are WHAT you will do. Here is a form you may find useful.

Strategy, or Macro-step	Materials to be used	Objective to be achieved

PREPARE A DETAILED PLAN

The Detailed Plan contains the TECHNIQUES and TACTICS you will use to implement your Strategies in the order in which they will be employed. TECHNIQUES and TACTICS are small units of work--microdesigns, in effect. TECHNIQUES and TACTICS for this workshop include presentations, discussions, procedures (this Workbook, for instance), groupings for work, inputs, giving and receiving feedback. TECHNIQUES and TACTICS are HOW you will present the training. Here is a form you may find useful.

Time	Number and Name of Step for the Participant	Directions (for the trainer)	Materials and Handouts	Objective and/or Rationale

81

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SAMPLE

TRAINING DESIGN DEVELOPMENT CHART

Session # _____ Title _____

TIME	STEP	RATIONALE	MATERIALS	DIRECTIONS

SAMPLE

I. PREPARATION PHASE -- Designing Training Events

A	B	C	D
TARGET POPULATION Number, characteristics, needs, readiness, individual differences	OUTCOMES Behaviors, values, attitudes, knowledges	POSSIBLE ACTIVITY INGREDIENTS AND METHODS Kinds of groupings, variety of experiences	HUMAN AND MATERIAL RESOURCES Physical setup, media, consultants, logistics, etc.

SAMPLE

II. PLANNING THE SEQUENCE OF LEARNING ACTIVITIES

GOALS OF SESSION _____ Participants _____

_____ Total Time _____

_____ Dates _____

A TIME	B NAME OF ACTIVITY	C METHODS AND TECHNIQUES	D WHO IS RESPONSIBLE	E RESOURCES a. Human b. Material

88

87

WORKSHEET FOR STATING LEARNING OBJECTIVES*

WORKSHEET FOR STATING LEARNING OBJECTIVES

Behavioral Aspect	Content Areas
To develop <u>knowledge</u> about	1. 2. 3. 4. 5. 6. 7.
To develop <u>understanding</u> of	1. 2. 3. 4. 5. 6. 7.
To develop <u>skill</u> in	1. 2. 3. 4. 5. 6. 7.
To develop <u>attitudes</u> toward	1. 2. 3. 4. 5. 6. 7.
To develop <u>interest</u> in	1. 2. 3. 4. 5. 6. 7.
To develop <u>values</u> of	1. 2. 3. 4. 5. 6. 7.

*Malcolm S. Knowles, The Modern Practice of Adult Education: Andragogy Versus Pedagogy, Association Press, New York, 1970.

MATCHING TECHNIQUES TO DESIRED BEHAVIORAL OUTCOMES*

MATCHING TECHNIQUES TO DESIRED BEHAVIORAL OUTCOMES

Type of Behavioral Outcome	Most Appropriate Techniques
KNOWLEDGE (Generalizations about experience; internalization of information)	Lecture, television, debate, dialog, interview, symposium, panel, group interview, colloquy, motion picture, slide film, recording, book-based discussion, reading.
UNDERSTANDING (Application of information and generalizations)	Audience participation, demonstration, motion picture, dramatization, socratic discussion, problem-solving discussion, case discussion, critical incident process, case method, games.
SKILLS (Incorporation of new ways of performing through practice)	Role playing, in-basket exercises, games, action mazes, participative cases, T-Group, nonverbal exercises, skill practice exercises, drill, coaching.
ATTITUDES (Adoption of new feelings through experiencing greater success with them than with old)	Experience-sharing discussion, group-centered discussion, role playing, critical incident process, case method, games, participative cases, T-Group, nonverbal exercises.
VALUES (The adoption and priority arrangement of beliefs)	Television, lecture (sermon), debate, dialog, symposium, colloquy, motion picture, dramatization, guided discussion, experience-sharing discussion, role playing, critical incident process, games, T-Group.
INTERESTS (Satisfying exposure to new activities)	Television, demonstration, motion picture, slide film, dramatization, experience-sharing discussion, exhibits, trips, nonverbal exercises.

*Malcolm S. Knowles, The Modern Practice of Adult Education: Andragogy Versus Pedagogy, Association Press, New York, 1970.

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QUESTIONS TO ANSWER IN DESIGNING A TRAINING EVENT

Training event means, here, a series of activities lasting anywhere from a few hours to several weeks which seek to accomplish some goals of making things different from what they were before. A design tells what is done, when and where it is done, by who., how and for what reason. It generally helps to write all of this down in a time schedule sort of outline. In creating and carrying out a design for a training event, there are many questions that get answered. Some of these questions get answered by thinking about them and doing some careful planning. Often there are a lot of important questions that do not get asked or thought about and the answers to them become a matter of chance. This can lead to unnecessary difficulty in carrying out the design successfully. The following are ten groups of questions that need good answers in creating a design for a training event. Please read them all the way through before starting your designing task. It may prove helpful to refer to them as you work. You may think of others that should be added to this list.

1. Goals. How are the purposes and goals of the training event set? Who sets them--trainers, trainees, administrators, others? Are they set before the event? Is there time for giving them some thought during the event? Are they open to change during the event? How do they get changed--in planned ways--in unplanned ways? Are the goals sensible given the amount of time available for the event? Do these goals fit into a meaningful, long-range training program?

2. Activities. What kinds of activities are to be included in the event? Do they clearly lead to the goals of the training event? Do they support things that must happen if the training is to be a success? Do they leave the trainees with a clear idea of what they are to do differently as a result of the training? Do they give people a chance to try out new behaviors so that they will be able to carry out their new ideas? Do the activities only reflect things that the trainers think are important as opposed to reflecting what the trainees see as important? Does there need to be some pre-training of skills needed to carry out an activity (e.g., such as skill training in how to role play before being able to use role playing as a training activity)? Do the different activities in the event fit together in an understandable way? Does the staff need some special training to carry out the activity? Is there the right amount of time available for each activity? How much time should be spent in thinking activities--discussing activities--doing activities--looking at process activities--evaluating and planning activities? Are there some activities that should be done before coming to the event? Are there some activities that should be done after going home from the event? Are individual differences in feelings and abilities taken into account in relation to each activity?

3. Size and grouping. How many people can be handled in the event? What size groups should be used for each activity? What people should be included? When and how should trainers be included in a group? How much time should be spent alone, in small groups, in large groups

in large groups meeting together? What roles need to be set up in a particular group--observer, recorder, chairman? How do roles get set up and used effectively?

4. Here and now versus there and then. How much focus should be on what is going on here and now versus what is to happen in the back-home there and then? How can there and then focus be made meaningful in the here and now? What kinds of planning and practicing can help things be different once the trainees are back in the there and then?

5. Feedback. How and when do the trainers get feedback from the trainees? How and when do the trainers give feedback to the trainees? How and when do the expectations of the trainees and of the trainers get shared and clarified?

6. Inter-staff relationship. How does the trainer staff deal with its own inter-staff relationship and procedures for working together? Is there time set aside for this? Are expectations and views of each other shared? Are things done that support constructive encounters? Are the lines of influence clear and acceptable?

7. Decision making. What are the ways that decisions get made? Is everyone clear about them? What are people's feelings about them? Who and what influences decisions?

8. Setting for the training event. Where should the event be held? Are there some maximum and some minimum requirements to think about in picking a setting? Are there restrictions or special advantages about the setting that has been selected? How can the setting be used creatively? How should the people who are in charge of the setting be involved in the design?

9. Administration. How should the training event be administered? Who will take care of the routine administrative jobs? How will the administrative factors influence carrying out the design that has been planned?

10. Evaluation. How and by whom is the training event to be evaluated? Is each activity to be evaluated as well as the overall design? What kinds of data need to be collected? How and by whom is the data to be analyzed? Who is to see the evaluation? Will the evaluation really tell if the goals were accomplished? Will the evaluation really tell why goals were or were not accomplished? Will the evaluation really be helpful in planning for future training events? Do some procedures need to be set up to support using the evaluation in the future? Is enough time allowed for evaluation work? Is evaluation work an expected, accepted and understood kind of activity for everyone involved in it?

PLANNING*

When the word *planning* comes up in a book like this, many people grow uneasy. For some it simply means a lot of busy work when what we need to do is "get in there and get the job done." (Have you ever helped someone move who was using that method?) For others it means the tedious task of racking the brain trying to anticipate all possible problems. For others it produces an anxiety about the event, and for a rare few it represents a curb on spontaneity. But for most people, planning in a technical book like this apparently means something different from what it means when it is used in a household phrase such as "planning a party." That is probably because so many books follow the work with a great many unreadable charts and graphs.

In this book the word is used as in "planning a party." Here is my simple checklist for planning. A complete plan (of any kind) contains a specification of the *Five W's and the H*:

W_1 -- specifies *why*, a statement of interest, tendency, documented need, or pure whim.

W_2 -- specifies *what* you will be doing or trying to do, often known as an objective.

W_3 -- specifies both *who* and *to whom*.

W_4 -- specifies *when* you will start doing it and *when* you hope to stop.

W_5 -- specifies *where*.

H -- specifies *how*; the strategy or flow of events that lead to the *what*.

This is not a method for planning, nor is it a format for the plan. It is a checklist, a tool for checking any plan or piece of a plan for completeness.

*Larry Nolen Davis, Planning, Conducting, Evaluating Workshops, Learning Concepts, Austin, Texas, 1974.

A CHECKLIST FOR ALL THAT GOES INTO CONDUCTING A WORKSHOP

There's more to planning a workshop than designing and conducting the training activities. Although in this workshop we do not intend to attend to all of these elements, many of them may greatly influence the design of the training event. We are using the list of chapters in Davis' book as a checklist for you to keep in mind as you design training events.[1]

Chapter 1: Assessing Needs--a guide to specifying why.

Chapter 2: Specifying Objectives--a guide to specifying what.

Chapter 3: Selecting Resources--a guide to specifying who and some of how.

Chapter 4: Designing Activities--a guide to specifying most of the how and a good portion of when.

Chapter 5: Budgeting--budgeting is not an essential part of every complete plan, but is included here as the how of how.

Chapter 6: Making Arrangements--a guide to specifying where, with some implications from how and for when.

Chapter 7: Rehearsing--a guide to refining all the above.

Chapter 8: Packing--a guide without which what might never be reached.

Chapter 9: Setting Up--employs the standard elements as a basis for analyzing this preparatory activity.

Chapter 10: Setting the Learning Climate--describes the purpose, ingredients and behaviors involved in getting the workshop off on the right foot.

Chapter 11: Agreeing on Objectives--explores the methodology and psychology of the educational contract.

Chapter 12: Directing Learning Activities--analyzes the dynamic interaction of elements and the adult educator's role in "harmonizing" them; includes a look at the many-faceted world of group dynamics.

Chapter 13: Closing Shop--details the administrative and janitorial activities that give the workshop that "finished look."

[1] Davis, Larry Nolan, Planning, Conducting, Evaluating Workshops, Learning Concepts, Austin, Texas, 1974, pp. 32 and 199.

SAMPLE

ELEMENTS TO CONSIDER

In both the literature and practice of adult education, the thing that perhaps causes the most confusion is the tremendous assortment of items to be considered in planning and conducting learning activities. As a means of clearing the fog, I have devised a list of twelve standard elements that encompasses most of these items. In this chapter and many of the following ones, this list is used as the basis for describing and analyzing the various tasks that produce successful workshops. The twelve elements are:

1. Materials
2. Staff
3. Consultants
4. Participants
5. Structure
6. Aids
7. Facilities
8. Accommodations
9. Food and Refreshments
10. Dates
11. Travel
12. Promotion

In most cases the numerical sequence of the above elements corresponds with the order in which they might best be considered. In Chapter 4 I modify the order but retain the numerical designations due to their usefulness on the worksheets. Not all the elements are applicable to every activity, and this is noted in the text. Additionally, it was necessary for the sake of completeness to add elements at certain points; they are numbered thirteen, fourteen, etc. In this chapter, I have added a thirteenth element.

*Larry Nolan Davis, Planning, Conducting, Evaluating Workshops, Learning Concepts, 1974.

Let's consider the elements one by one and see how they apply to selecting resources for learning.

1. Materials

By materials I mean those inanimate resources that often form the foundations for learning. Such resources include the following:

a) Printed material--books, articles, excerpts, case studies. . . .

b) Audio-visual material—films, tapes, slides, videotapes, multimedia. . . .

c) Packaged material — programmed instruction, games, simulations. . . .

Each type has its advantages and disadvantages. The important thing is to select learning materials that contribute to attaining the objective. If the needs assessment is well done, then the level of difficulty is already prescribed and contained in the objective. Materials that cover more ground than necessary should be edited.

2. Staff

Staff should be selected for their content expertise or their skill in facilitating the learning. We should make our intention clear for each person chosen. Potential staff includes the educator planning the workshop, assistants, supervisors, and other authorities from any organizations involved. These individuals should be selected on the basis of their potential contributions to the learning.

rather than for politics or public relations. Their styles should form a consistent pattern; they must be able to work together.

3. Consultants

There are only three reasons for bringing in outsiders: 1) they are the best content people for the job, 2) they are essential as facilitators in the learning process, or 3) they are free from the stigma of a "prophet in his own land." Again, their roles, content ranges, and styles should be considered. If you decide to use consultants, you should immediately check their availability and interest. Consultants book themselves several months in advance.

4. Participants

If participants are to be considered a resource for their own learning, you should make a rough estimate of their possible contributions. In addition, you must consider just how their resources will be blended with those selected from the elements above.

5. Structure

Structure means the way in which the materials and people are put together to accomplish learning. Structural options include those for:

a) *individuals*: they may be on chairs, behind tables, facing the speaker, back in their rooms. . . .

b) *groups*: there may be pairs, triads, etc.; they may be arranged in cir-

cles, squares, lines; isolated or interacting. . . .

c) *staff:* they may be up front, within groups, in back, out in the lobby. . . .

d) *combinations of the above:* approaching infinity.

For a more complete listing see p. 153.

At this point we are concerned only with stating some tentative conclusions regarding the value of certain structures as a resource for learning.

6. Aids

Aids are the various props that support the learning. These include such things as:

a) content aids--charts, graphs, projectors. . . .

b) staff aids--blackboards, easels, newsprint, tape. . . .

c) participant aids--pencils, paper, instructions. . . .

Detailed decisions about aids can be made only in the design stage. At this point, simply state your likes, dislikes, and theories concerning the helpfulness of any, all, or certain of these aids.

7. Facilities

At this point all that is required is a tentative judgement on the nature of the facilities needed for the workshop. Should the facilities be peaceful, plain, luxurious, etc? Should they be commuter facilities (in-house, in town) or dormitory facilities (in another city, in the country, etc.)? How large should they be, etc.?

8. Accommodations

These need be considered only if we conclude that participants should get away from it all for purposes of the workshop. If so then pleasantness, comfort, and amenities might merit some thought.

9. Food and Refreshments

What will coffee, tea, cokes, etc., contribute to learning effectiveness? Their importance varies with the time of day and the length of the workshop. If the workshop spans a customary mealtime (or several of them) decide whether group meals or individual arrangements will better suit the learning. Group meals get everyone back at the same time; individual arrangements allow time for "digesting" the learning.

10. Dates

Not relevant at this point.

11. Travel

Needs to be considered at this time only if it is, in itself, part of the learning.

12. **Promotion**

Dealt with in later chapters.

13. **Time**

You might consider whether a fast-paced or more leisurely workshop would be better for learning. Greater detail is a matter for the design stage.

*** *** ***

On the next page you will find Worksheet 3 for recording your tentative resource selections. This worksheet (and several to follow) is organized around the list of standard elements. For the most part, the worksheet is either self-explanatory or explained by the text of this chapter. It does, however, include one feature that should be explained: cross-referencing by GLO and SLO.* In the text I discussed the selection of resources generically; in practice it is often useful to pin certain of the resources down to specific objectives, and the vertical *SLO* column is for that purpose. For the elements that affect all SLO's equally, write *ALL* in the SLO column. Each GLO requires a separate worksheet.

In addition, you will find a format for permanent maintenance of a learning resource inventory. This format is designed so that resources may be grouped according to the content areas with which you commonly work. As an example, Group A might be General Management, Group B might be Supervisory Skills, etc.

*GLO = General Learning Objective

SLO = Specific Learning Objective

BEST COPY AVAILABLE

LEARNING RESOURCES SELECTION

Name | Group

GLO

Purpose: The notes on this sheet represent initial thoughts regarding the best resources for achieving the above General Learning Objective. Each SLO relating to this GLO is cross referenced by number (see Worksheet Two).

RESOURCES

SLO #

1. Materials:
   Title | Type | Style
   a)
   b)
   c)
   d)

2. Staff
   Name | Role | Style
   a)
   b)
   c)
   d)

3. Consultants
   Name | Role | Style | Available
   a)
   b)
   c)
   d)

4. Participants (possible contributions to learning/by SLO)
   a)
   b)
   c)
   d)

5. Structure (desirable/by SLO #)
   a)
   b)
   c)
   d)

6. Aids (preferences by SLO#)
   Content | Staff | Participants

7. Facilities (qualities desired)

8. Accommodations (desirable qualities, if applicable)

9. Food and Refreshments

N/A

10. Dates, 11. Travel, 12. Promotion—Not applicable.

13. Time (fast paced or slow paced, preferences by SLO #)

SAMPLE

LEARNING RESOURCE INVENTORY

Group A Group B Group C

MATERIALS (grouped according to general content)

Group	Title	Source	Type	Style	Cost
A					
B					
C					

POTENTIAL STAFF (in house, grouped according to specialty)

Group	Name	Department	Specialty	Style
A				
B				
C				

CONSULTANTS (group according to specialty)

Group	Name	Address	Specialty	Style	Fee
A					
B					
C					

AIDS (audiotape)

Type	Location	Cost, if any

FACILITIES

Name	Location	Qualities	Cost

APPENDIX G

FEEDBACK

(Pino, Rene', Northwest Regional Lab., Portland, Oregon.)

"Feedback" is a way of helping another person consider changing his/her behavior. It is communication that gives another person or a group information about how he, she or it affects others. As in a guided missile system, feedback helps individuals keep their behavior "on target" and thus better achieve their goals.

Some criteria for useful feedback:

1. It is descriptive rather than evaluative. Describing your own reactions leaves the other person free to use or not use the feedback. Avoiding evaluative language reduces the need for the other person to react defensively.

2. It is specific rather than general. Telling someone he/she is dominating is not as useful as telling him/her, "Just now when we were deciding the issue, you seemed inattentive to what others were saying, and I felt forced to accept your arguments or face your anger."

3. It takes into account both your needs and the needs of the other person. Feedback can be destructive when it serves only your own needs and fails to consider the needs of the person on the receiving end.

4. It is directed toward behavior which the receiver can do something about. Frustration is only increased when you remind a person of some short-coming over which he/she has no control.

5. It is solicited rather than imposed. Feedback is most useful when the receiver himself/herself has formulated the kind of question which you can answer.

6. It is well timed. In general, feedback is most useful immediately after the given behavior has occurred (depending, of course, on the person's readiness to listen, on the support available from others, etc.).

7. It is checked for clarity. One way of doing this is to have the receiver try to rephrase the feedback he/she has received to see if it corresponds to what you had in mind.

8. When giving feedback in a training group, you and receiver both have the opportunity to check the accuracy of the feedback with others in the group. Is this only your impression, or an impression shared by others?

Feedback, then, is a way of giving help; it is a corrective mechanism for the individual who wants to learn how well his/her behavior matches his/her intentions. It is a means for establishing one's identity, for answering the question, "Who am I?"

THE JOE-HARRY WINDOW AND THE CONCEPT OF FEEDBACK

As you develop a helping relationship with another person--a relationship where each of you helps the other to grow--there are some things you know about yourself and some you don't know and there are some things that others know about you and some they don't know. For you and any other specific person this can be represented by the following diagram known as the Joe-Harry Window.*

Things about myself that I--

Things about myself that the other--	Know	Don't Know
Knows	common knowledge	my blind spots that even my best friends haven't told me about
Does Not Know	my secrets and things I haven't had a chance to tell yet	my hidden potential of things I never dreamed I could do or be

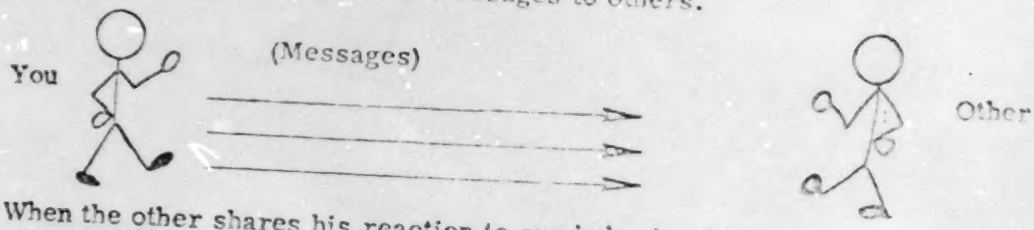
The "blind spots" and "secret" areas become smaller as more information about each other becomes common knowledge. It is not meant to be implied here that a person should be completely or indiscriminately open. There are many things that are not relevant to the helping relationship. As relevant things are shared and found to be helpful, trust develops, which allows exploration and discovery of new abilities in the area of hidden potential.

Giving and receiving feedback is one of the most important processes in developing effective teamwork relationships. Feedback, the sharing of your reactions to another's behaviors with that other person, is not simply being critical. Positive feedback is just as important as are reactions that seem negative. The intention is what counts if the feedback is to help develop a growth

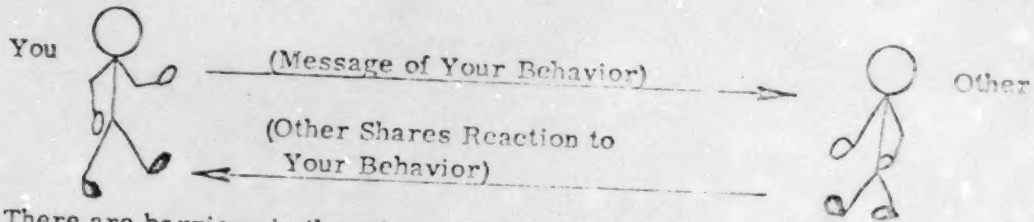
*Adapted from "The Johari Window" as developed by J. Luft and H. Ingham in Group Processes, by Joseph Luft. Palo Alto, California: The National Press, 1963, pp. 10-15.

relationship. Feedback can clarify perceptions. It can help an individual see himself as others see him. It helps him know the particular ways that different individuals react to his behaviors. He can then better match his behaviors with his intentions. He can more accurately match his verbal and nonverbal behaviors.

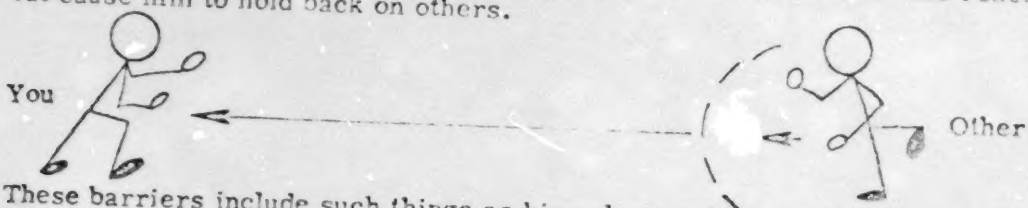
Our behavior constantly sends messages to others.



When the other shares his reaction to our behavior this is called feedback.

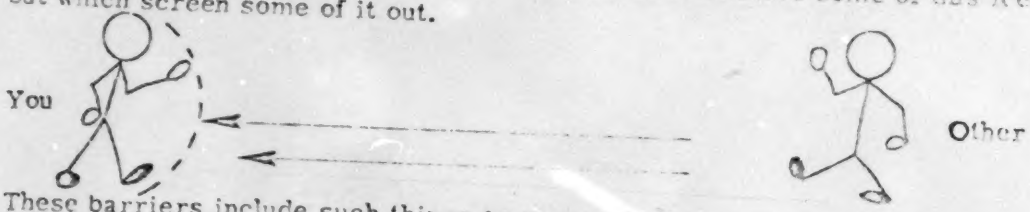


There are barriers in the other which allow him to share some of his reactions, but cause him to hold back on others.



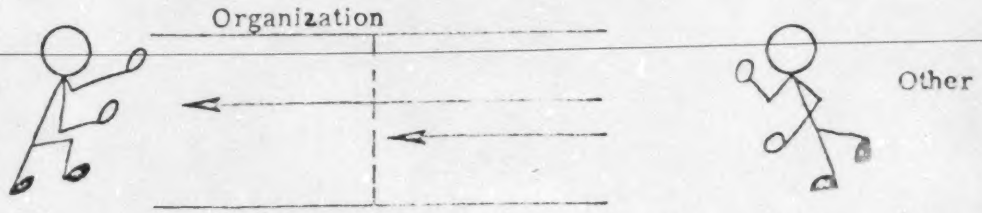
These barriers include such things as his values and ideologies, his assumptions about how you might react to his feedback, his openness, trust and willingness to take risks.

There are barriers in each of us which allow us to receive some of this feedback, but which screen some of it out.



These barriers include such things as your values and ideologies, the image you hold of yourself and the strength of your need to maintain it, your assumptions about his intentions in sharing, your openness, trust and willingness to take risks.

There may be barriers in the way your organizations operate that make it hard for some kinds of feedback to take place.



These barriers include such things as highly formal procedures, lack of time to build growth relationships, isolation of roles, building layout, or norms that don't support helpful kinds of sharing.

There also may be things in you, in the other and in the way your organization operates that facilitate constructive exchanges of feedback. A major helping factor can be awareness and use of the guidelines for giving and for receiving feedback. Note that these are only guidelines, not hard and fast rules. There are undoubtedly situations for each guideline that call for exceptions. The idea is to be aware of these guidelines and apply them unless you already believe an exception is called for.

Guidelines for Giving Feedback

1. Allows for receiver readiness -- Has the receiver indicated he is ready to listen and accept the feedback as it is intended? There is little point to giving feedback that won't be heard or will be misunderstood.

2. Is descriptive, not interpretive -- Feedback is a description of your perceptions and reactions. Interpreting meanings of another's behavior is often a guessing game which the other resents. Let him share his own meanings if he's so inclined. If you want to check your perception of his meaning, be very clear that is what you are doing.

3. Covers recent happenings -- Generally, the closer the feedback is to the time the behavior occurred, the more helpful it is. When feedback is given immediately, all know exactly what it refers to and feelings about the situation are most valid.

4. Comes at appropriate times	--	Don't, for example, share negative reactions when there are others present who would not understand the constructive intent of your remarks.
5. Includes things that are new	--	Consider whether the reactions you are sharing are new information to the other. If they are so obvious that he is already aware of them, they won't help much. Telling another what you saw him doing is often not news. Often, what is news is the sharing of how you reacted to what you saw.
6. Is on changeable things	--	The value of feedback to the other is in being able to modify his behavior if he wants to. Reactions to things that can't be changed are not usually helpful.
7. Does not demand a change	--	Feedback is sharing reactions. It's up to the receiver if he wishes to make a change in his behavior based on the feedback. If you want to ask the person to change, say so, but don't consider such a request as feedback.
8. Is not an overload	--	If you give another too much feedback or too many things all at once it may be more than he can deal with. He may lose track of all you are saying.
9. Is given to be helpful	--	Consider your own mouvation in sharing the reactions. Are you really trying to help the other person gain a useful view of himself? If you are simply angry at the other and wish to express it, say so, but don't present such feelings as feedback.
10. Shares something of the giver	--	Giving feedback can create a sense of imbalance in the relationship. It generally helps the receiver to feel more comfortable and be more active if the giver can share some of his own feelings and concerns as he gives his reactions to the other.
11. Is specific, not general	--	Be specific by quoting and giving examples of what you are referring to.

Guidelines for Receiving Feedback

1. Checks understanding -- Use such behavior as paraphrasing to be sure you understand the meaning of the other's reactions. Watch out for becoming argumentative or taking a lot of time giving the rationale for your behavior, rather than working to understand the other's feedback to you.

2. Asks for feedback about specific things -- You can help the giver provide useful reactions by asking for feedback about specific things. This indicates your areas of readiness to receive feedback and helps him be specific rather than general.

3. Shares reactions to feedback -- Sharing your reactions to the feedback you have received can help the giver improve his skills at giving useful feedback. It also lets him know where he stands with you on a feeling basis so that the relationship can continue to grow. If he goes off uncertain about your reactions to his feedback, he may feel less inclined to risk sharing them with you in the future.